

NextGen UI for Concur Request – End User

Transition Guide

NextGen UI for Concur Request – End Users

Section 1: Overview

SAP is pleased to announce the Next Generation User Interface (NextGen UI) for Concur Request – a new interface for Concur Request end users. The NextGen UI for Concur Request provides an intuitive, integrated, efficient experience. The following pages describe the enhancements.

In this Guide

In this guide, the current user interface is called the *existing UI*. The Next Generation user interface for Concur Request is called *NextGen UI*.

Affected Users

The NextGen UI for Concur Request affects end-user pages and processes. It **does not** affect:

- Pages and processes used by processors, even if the request being viewed by the processor was created by a Concur Request user in the NextGen UI
- Profile
- Tools or configuration pages

Screen Samples and Features

Remember, Concur Request features are configurable by your company so the fields, layout, options, etc. shown in this guide may differ from those chosen by your company.

Section 2: Manage Requests Page

When you click the **Requests** tab, the **Manage Requests** page appears.

The screenshot displays the SAP Concur 'Manage Requests' page. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals', 'Reporting', 'App Center', and 'Links'. The main content area is titled 'Manage Requests' with a 'View: Active Requests' dropdown. A grid of request tiles is shown, each with a status bar at the top, a title, an amount, and a status description at the bottom. A 'Create New Request' button is visible in the top-left corner of the grid.

Status	Date	Title	Amount	Status Description
NOT SUBMITTED	06/04/2020	Trip to Paris	\$1,747.79	
NOT SUBMITTED	02/21/2020	May Sales Conference - Barcelona	\$245.00	
READY TO BOOK	11/20/2019	Car Rental for Site Visit	\$444.62	Approved - Pending Booking
READY TO BOOK	10/15/2019	New York Conference	\$670.00	Approved - Pending Booking
RETURNED	05/31/2019	Car/Hotel Reservation	\$99.00	Sent Back to Employee
READY TO BOOK	11/06/2019	Business Lunch	\$200.00	Approved - Pending Booking
SUBMITTED	11/06/2019	cash advance	\$0.00	Submitted & Pending Approval Davis, Pat
READY TO BOOK	10/11/2019			
NOT SUBMITTED	04/22/2019			
NOT SUBMITTED	04/22/2019			
RETURNED	09/30/2019			

The **Manage Requests** page has been simplified, and there are a number of changes to the page:

- Request Tiles
- View List
- Request Lists
- Create New Request
- Delete, Copy, Close/Inactivate Buttons

Request Tiles

When viewing active requests on the **Manage Requests** page, requests are now displayed as individual tiles.

Existing UI

In the existing UI, your active requests are displayed in a list.

<input type="checkbox"/>	Request Type	Request Name	Request ID	Status	Request Dates	Date Submitted	Total
<input type="checkbox"/>	Travel	Trip to Paris Work with Team Leon	39PG	Not Submitted	12/24/2018		\$3,350.00
<input type="checkbox"/>	Authorization	Office Supplies Standard office materials	39PF	Submitted & Pending Approval - Davis, Pat R.	05/15/2018 05/22/2018	05/15/2018	\$0.00
<input type="checkbox"/>	Travel	Client Sales Meeting Client Sales Meeting	39PA	Not Submitted	03/28/2018 03/29/2018		\$0.00
<input type="checkbox"/>	Authorization	Trip to New York Sales meeting	39P7	Not Submitted	03/01/2018		\$1,900.00
<input type="checkbox"/>	Authorization	Trip to New York Sales meeting	39NX	Not Submitted	02/01/2018 02/04/2018		\$3,800.00
<input type="checkbox"/>	Travel	Client Meeting Sales Meeting	39NM	Not Submitted	08/16/2017 08/18/2017		\$377.00
<input type="checkbox"/>	Travel	New August Request Testing usage.	39NK	Not Submitted	08/08/2017 08/11/2017		\$605.00
<input type="checkbox"/>	Travel	Test car Test for CLQ CLQ-55823	34PJ	Submitted & Pending Approval - Kuykendall, Deb	04/11/2017 04/15/2017	02/06/2017	\$50.00
<input type="checkbox"/>	Travel	December Sales Meeting Sales meeting	34PF	Submitted & Pending Approval - Davis, Pat R.	12/19/2016	12/06/2016	\$700.00

NOTE: In the existing UI, you can copy and delete selected requests from this page. In the NextGen UI for Concur Request, those tasks are completed from within a request, as detailed later in this guide.

NextGen UI

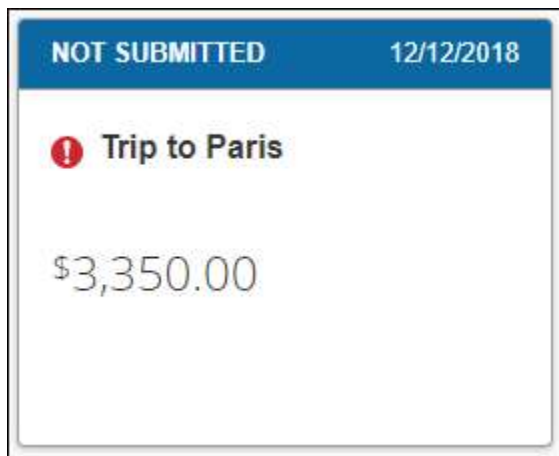
In the NextGen UI for Concur Request, each active request is displayed as an individual tile. The tiles are sorted by date of creation.

The screenshot displays the SAP Concur NextGen UI interface for managing requests. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals', 'Reporting', 'App Center', and 'Links'. The main content area is titled 'Manage Requests' and shows a grid of request tiles. Each tile represents a request with its status, title, amount, and date.

Status	Date	Title	Amount	Notes
NOT SUBMITTED	06/04/2020	Trip to Paris	\$1,747.79	
NOT SUBMITTED	02/21/2020	May Sales Conference - Barcelona	\$245.00	
READY TO BOOK	11/20/2019	Car Rental for Site Visit	\$444.62	Approved - Pending Booking
READY TO BOOK	10/15/2019	New York Conference	\$670.00	Approved - Pending Booking
RETURNED	05/31/2019	Car/Hotel Reservation	\$99.00	Sent Back to Employee
READY TO BOOK	11/06/2019	Business Lunch	\$200.00	Approved - Pending Booking
SUBMITTED	11/06/2019	cash advance	\$0.00	Submitted & Pending Approval Davis, Pat
READY TO BOOK	10/11/2019			
NOT SUBMITTED	04/22/2019			
NOT SUBMITTED	04/22/2019			
RETURNED	09/30/2019			

Each tile includes the following information:

- Request name
- Status
- Request date
- Total
- Alert indicator (if request contains any alerts)
- Request's workflow status, such as Submitted and Pending Approval (if applicable)
- Approver's name (if applicable)
- Tile banner color indicates request status

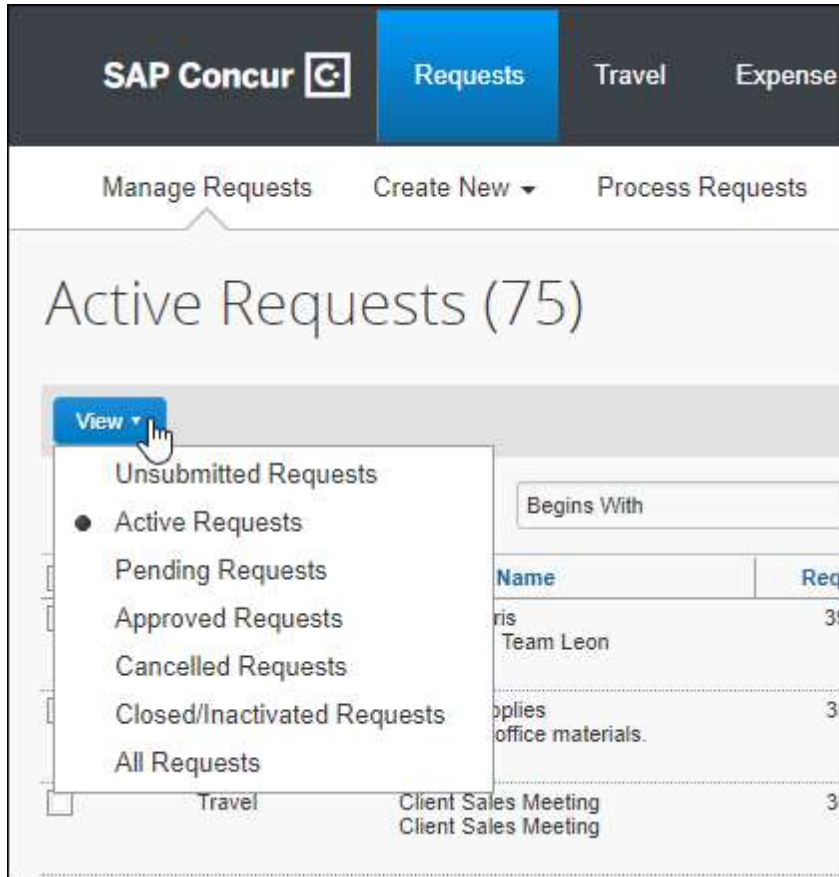


View List

The **Manage Requests** page in the NextGen UI for Concur Request still has a **View** list for viewing requests by status and for viewing all requests. The **View** list has the same selections, but the selection names have been updated to be more concise.

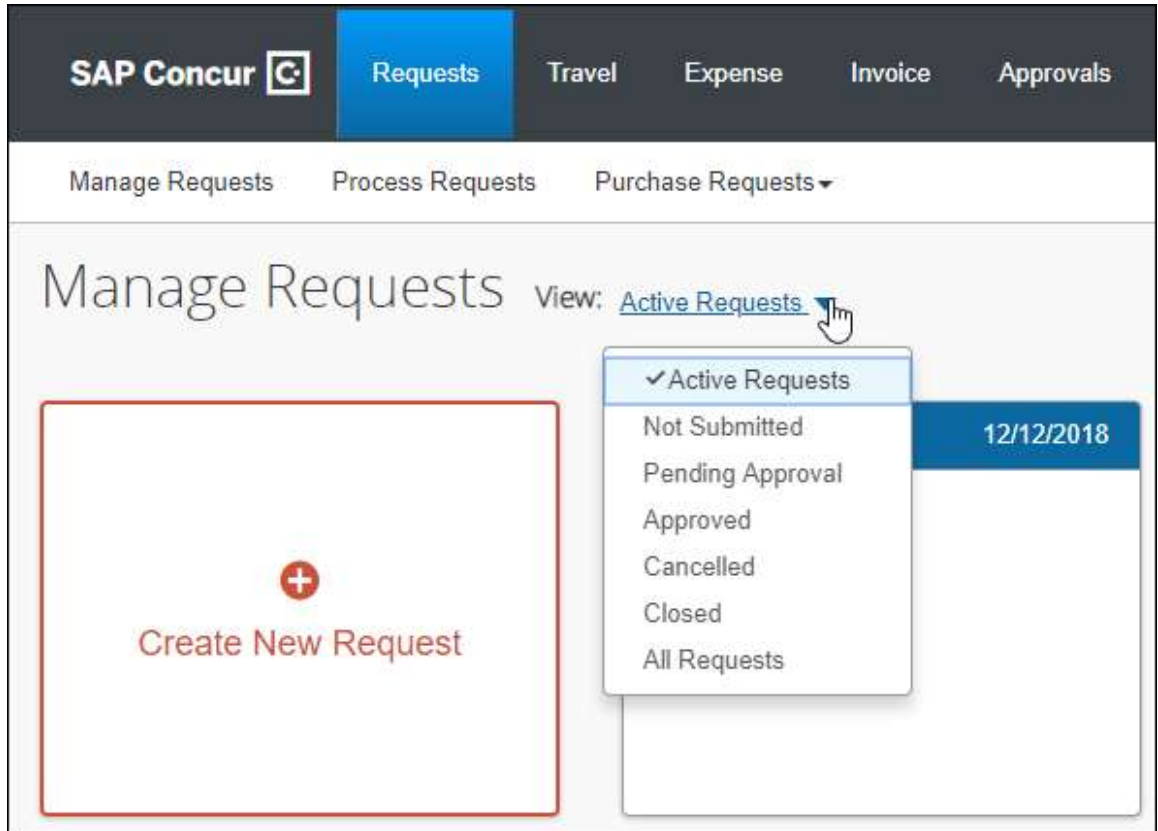
Existing UI

In the existing UI, the **View** list looks like this.

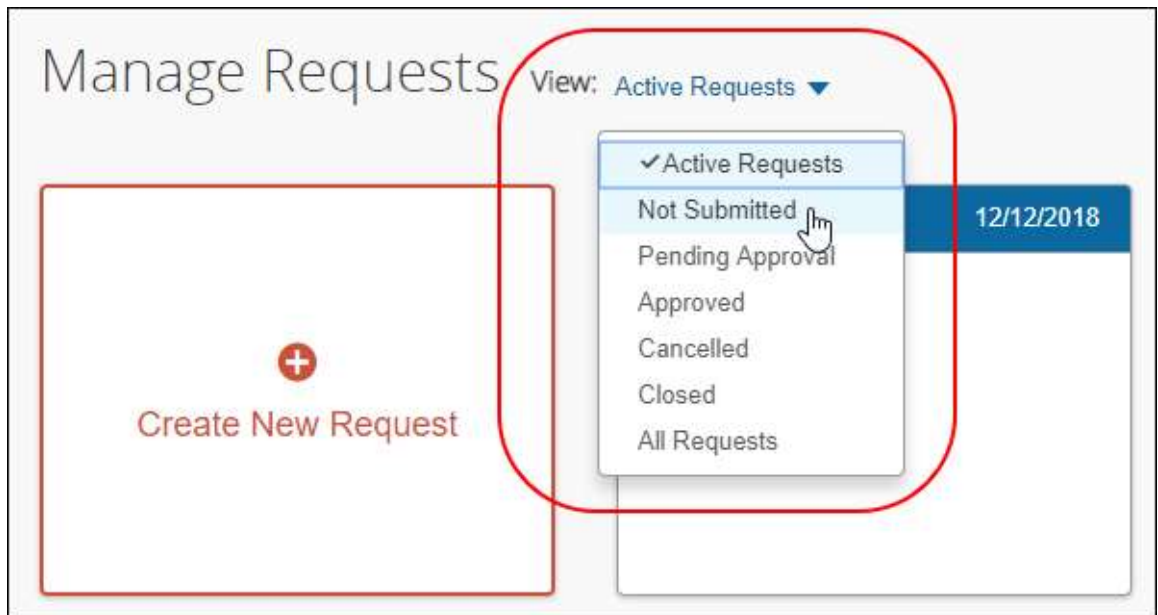


NextGen UI

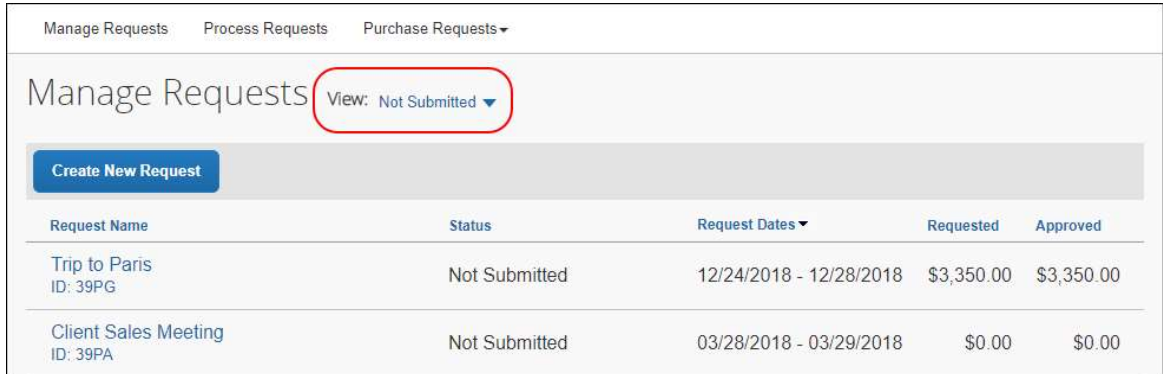
In the NextGen UI for Concur Request, the **View** list still defaults to *Active Requests*, but you can easily view other requests.



From the **View** list, select one of the request statuses or *All Requests*.



For example, if you select *Not Submitted*, the unsubmitted requests appear.



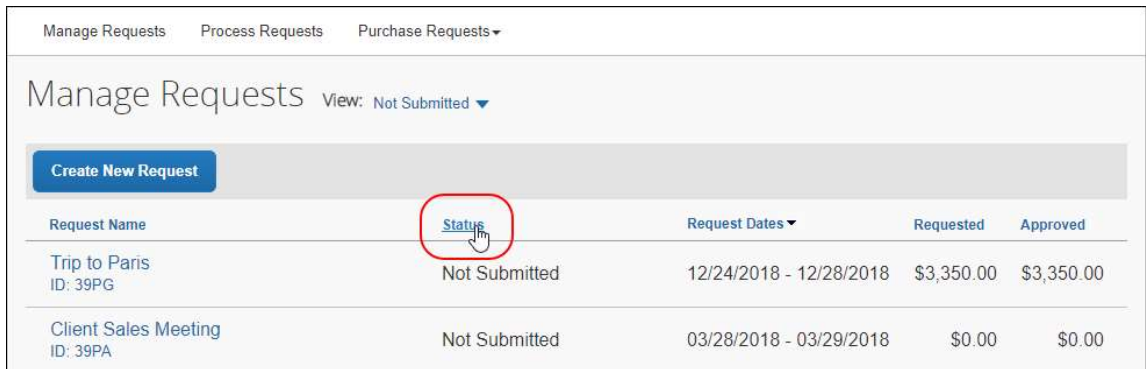
Manage Requests Process Requests Purchase Requests ▾

Manage Requests View: **Not Submitted** ▾

[Create New Request](#)

Request Name	Status	Request Dates ▾	Requested	Approved
Trip to Paris ID: 39PG	Not Submitted	12/24/2018 - 12/28/2018	\$3,350.00	\$3,350.00
Client Sales Meeting ID: 39PA	Not Submitted	03/28/2018 - 03/29/2018	\$0.00	\$0.00

To sort, click the column headings.



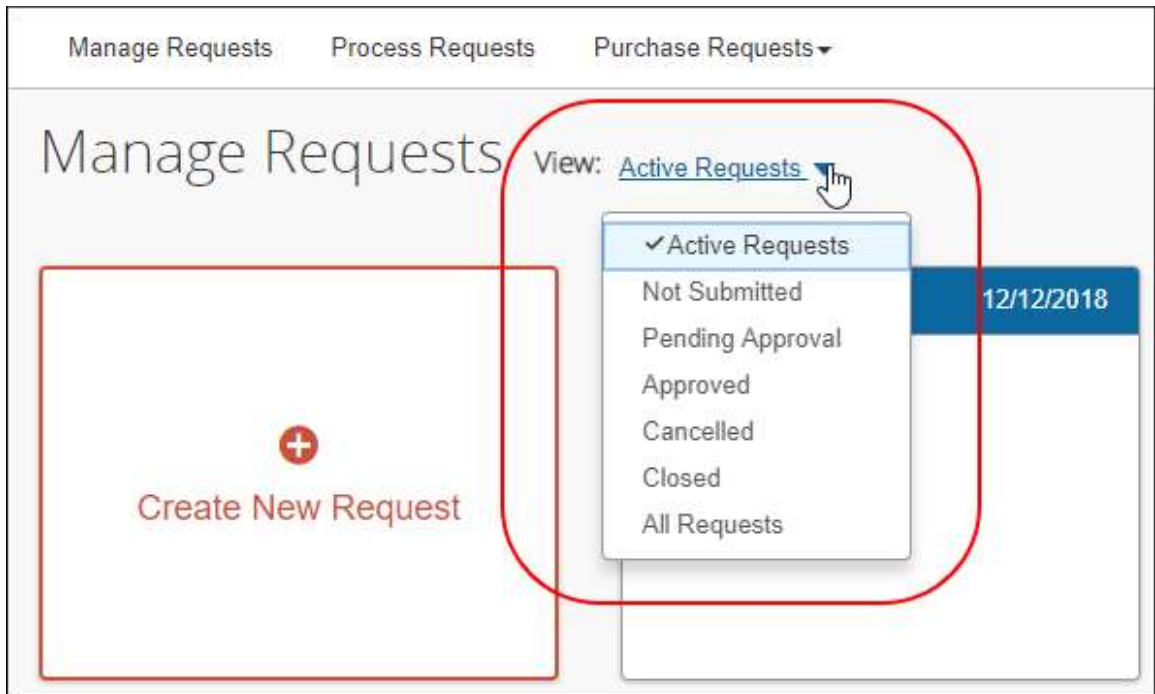
Manage Requests Process Requests Purchase Requests ▾

Manage Requests View: **Not Submitted** ▾

[Create New Request](#)

Request Name	Status	Request Dates ▾	Requested	Approved
Trip to Paris ID: 39PG	Not Submitted	12/24/2018 - 12/28/2018	\$3,350.00	\$3,350.00
Client Sales Meeting ID: 39PA	Not Submitted	03/28/2018 - 03/29/2018	\$0.00	\$0.00

To return to the active requests, select *Active Requests* in the **View** list.



Manage Requests Process Requests Purchase Requests ▾

Manage Requests View: **Active Requests** ▾

- ✓ Active Requests
- Not Submitted
- Pending Approval
- Approved
- Cancelled
- Closed
- All Requests

[Create New Request](#)

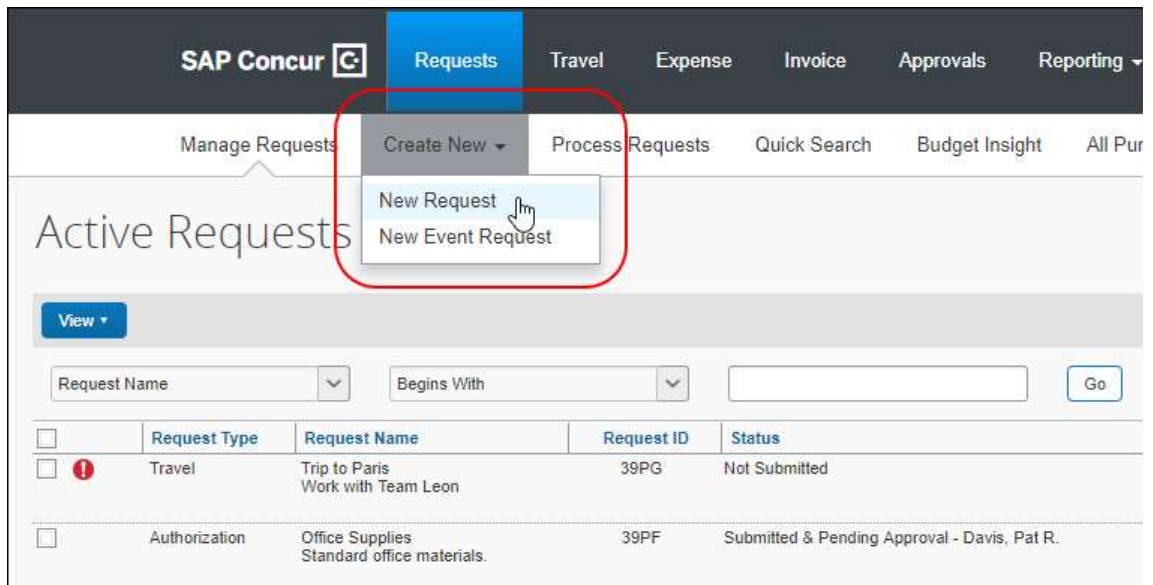
12/12/2018

Create New Request

To simplify the process for creating a new request, in the NextGen UI for Concur Request, the **Create New** menu above the **Manage Requests** page is removed and there is now a **Create New Request** tile and button on the page.

Existing UI

In the existing UI, users can create a new request by clicking *New Request* from the **Create New** menu.



NextGen UI

In the NextGen UI for Concur Request, when *Active Reports* is selected from the **View** list on the **Manage Requests** page, there is a **Create New Request** tile at the top of the page.

The screenshot shows the SAP Concur interface for 'Manage Requests'. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Invoice', and 'Approvals'. Below this, there are tabs for 'Manage Requests', 'Process Requests', and 'Purchase Requests'. The main heading is 'Manage Requests' with a 'View: Active Requests' dropdown. A red box highlights a large white tile with a red plus sign and the text 'Create New Request'. To the right, there are three request cards. The top card is titled 'NOT SUBMITTED' with a date of '12/12/2018' and contains a red warning icon, the text 'Trip to Paris', and the amount '\$3,350.00'. Below it are two more cards, both titled 'NOT SUBMITTED' with dates '03/01/2018' and '02/06/2018' respectively.

When *Not Submitted*, *Pending Approval*, *Approved*, *Cancelled*, *Closed*, or *All Requests* is selected in the **View** list, there is a **Create New Request** button at the top of the page.

The screenshot shows the SAP Concur interface for 'Manage Requests' with the 'View' set to 'Not Submitted'. The top navigation bar is the same as in the previous screenshot. Below the tabs, the heading is 'Manage Requests' with a 'View: Not Submitted' dropdown. A red box highlights a blue button labeled 'Create New Request'. Below the button is a table with the following data:

Request Name	Status	Request Dates	Requested	Approved
Trip to Paris ID: 39PG	Not Submitted	12/24/2018 - 12/28/2018	\$3,350.00	\$3,350.00
Client Sales Meeting ID: 39PA	Not Submitted	03/28/2018 - 03/29/2018	\$0.00	\$0.00

Clicking the **Create New Request** tile or **Create New Request** button opens the **Create New Request** page.



For more information about creating requests in the NextGen UI for Concur Request, refer to the *New Request and New Expenses – The Basics* section in this guide.

The screenshot shows a 'Create New Request' form with the following fields and controls:

- Agency Office:** A dropdown menu currently showing 'None Selected'.
- Request Name:** A required text input field (marked with a red asterisk).
- Start Date:** A date input field with a calendar icon, showing the format 'MM/DD/YYYY'.
- Request Policy:** A dropdown menu currently showing 'Travel Request Policy'.
- Purpose:** A required text input field (marked with a red asterisk).
- End Date:** A date input field with a calendar icon, showing the format 'MM/DD/YYYY'.
- Comment:** A large text area for additional information.
- Buttons:** 'Cancel' and 'Create' buttons are located at the bottom right of the form.

Delete, Copy, Close/Inactivate Buttons

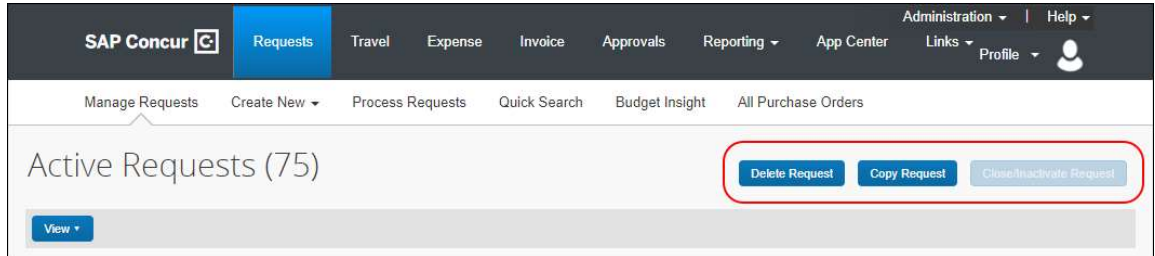
In the existing UI, you can copy, delete, close, and inactivate selected requests from the **Manage Requests** page. In the NextGen UI for Concur Request, those tasks are completed from within a request, as detailed later in this guide.




For more information about copying, deleting, closing, and inactivating requests in the NextGen UI for Concur Request, refer to the *Edit Requests, Copy Requests, Delete Requests and Expected Expenses, and Close/Inactivate Requests* sections in this guide.

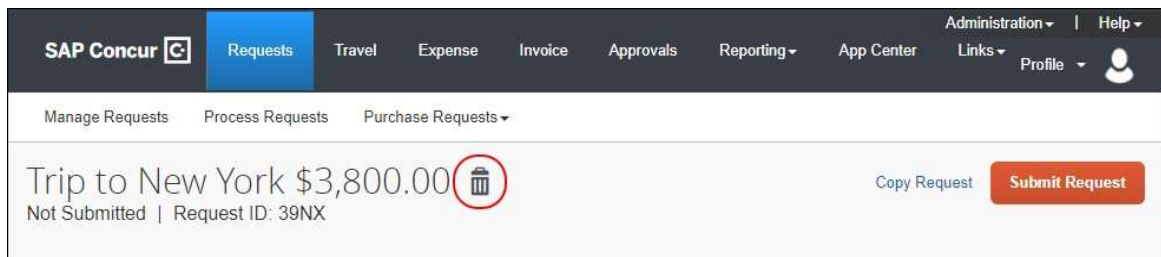
Existing UI

In the existing UI, the **Delete Request**, **Copy Request**, and **Close/Inactivate Request** buttons are located at the top of the **Manage Requests** page.

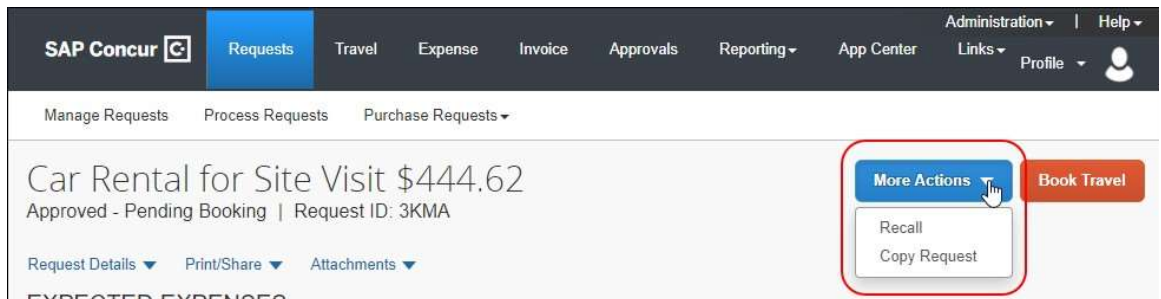
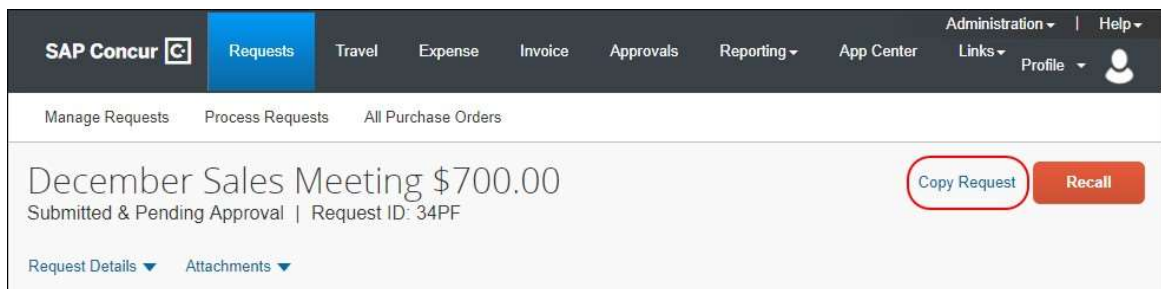


NextGen UI

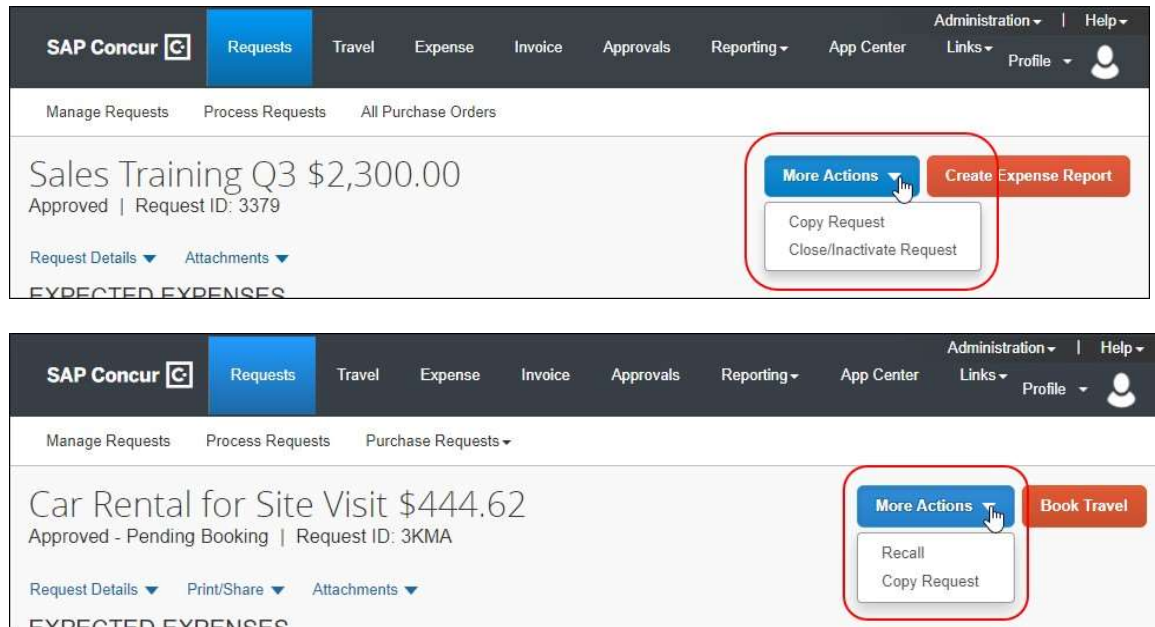
In the NextGen UI for Concur Request, requests can be deleted by clicking the delete icon, , located next to the request name and amount.



Depending on the request's current status, a request can be copied by clicking the **Copy Request** link or by clicking *Copy Request* from the **More Actions** list.



In an approved request, a request can be copied, closed, inactivated, or recalled from the **More Actions** list.



Section 3: New Request– The Basics

Just as before, typically when you create a new request, you start with the general request-specific page (the **Request Header** tab) and then move to the **Segments** tab to add the applicable travel segments. Though this basic process has not changed, the pages are more streamlined and easier to manage. In virtually all cases, when working with requests:

- The fields are larger and easier to navigate.
- Required fields are now marked with a red asterisk instead of a red band at the left edge of the field.

New Request

Existing UI

In the existing UI, the **Request Header** tab on the **Request** page looks like this.

The screenshot displays the SAP Concur web interface for creating a new request. The top navigation bar includes 'SAP Concur' and tabs for 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals', 'Reporting', 'App Center', 'Links', and 'Profile'. Below the navigation bar, there are links for 'Manage Requests', 'Create New', 'Process Requests', 'Quick Search', 'Budget Insight', and 'All Purchase Orders'. The main content area is titled 'Request' and features a status bar with buttons for 'Cancel', 'Save', 'Print / Email', 'Delete Request', and 'Submit Request', along with the text 'Status: Not Submitted'. The 'Request Name' field is populated with 'Trip to Paris'. The 'Request Policy' dropdown is set to 'Travel Request Policy'. The 'Start Date' is '10/08/2019'. The 'End Date' is '10/13/2019'. The 'Purpose' field contains 'Client site visit'. The 'Cash Advance' section includes a 'Cash Advance Amount' field, a 'USD' dropdown, and a 'Cash Advance Comment' field. The 'Request Header' tab is selected, and other tabs include 'Segments', 'Expenses', 'Approval Flow', and 'Audit Trail'.

NextGen UI

In the NextGen UI for Concur Request, the header page is called **Create New Request**. The fields are larger and easier to navigate.

The screenshot shows a 'Create New Request' form with the following fields and values:

- Agency Office: None Selected
- Request Name: Trip to Paris
- Start Date: 10/18/2020
- Request Policy: Travel Request Policy
- Purpose: Client site visit
- End Date: 10/22/2020
- Comment: (empty)

Buttons: Cancel, Create

NOTE: The fields that appear on this page are configurable by your company, so your **Create New Request** page may be different from the one shown here.

Complete the fields and click the **Create** button to move to the next page.

Segments

How segments appear in a request has significantly changed between the existing UI and the NextGen UI for Concur Request. While the functionality of segments is the same, how they are created and displayed for a request in the NextGen UI is different.

Existing UI

In the existing UI, segments are created for a request on the **Request** page by clicking a segment type icon and entering the segment information on the **Segments** tab.

The screenshot shows the SAP Concur interface for a request titled "Request 3C7Y". The "Segments" tab is active, displaying a form to add a segment. The segment type is "Air Ticket" (Round Trip), with an amount of 821.00 USD. The form is divided into "Outbound" and "Return" sections. The "Outbound" section includes fields for "From" (Seattle/Tacoma (Airport - SEA), Seattle, Washington), "To" (Charles De Gaulle Intl (Airport - CDG), Paris, FRANCE), "Date" (10/08/2019), "Depart at" (07:00 am), and "Vendor Name" (Delta). The "Return" section includes fields for "Date" (10/13/2019), "Arrive at" (09:00 pm), and "Vendor Name" (Delta). There are "Save" and "Cancel" buttons at the bottom right of the form.

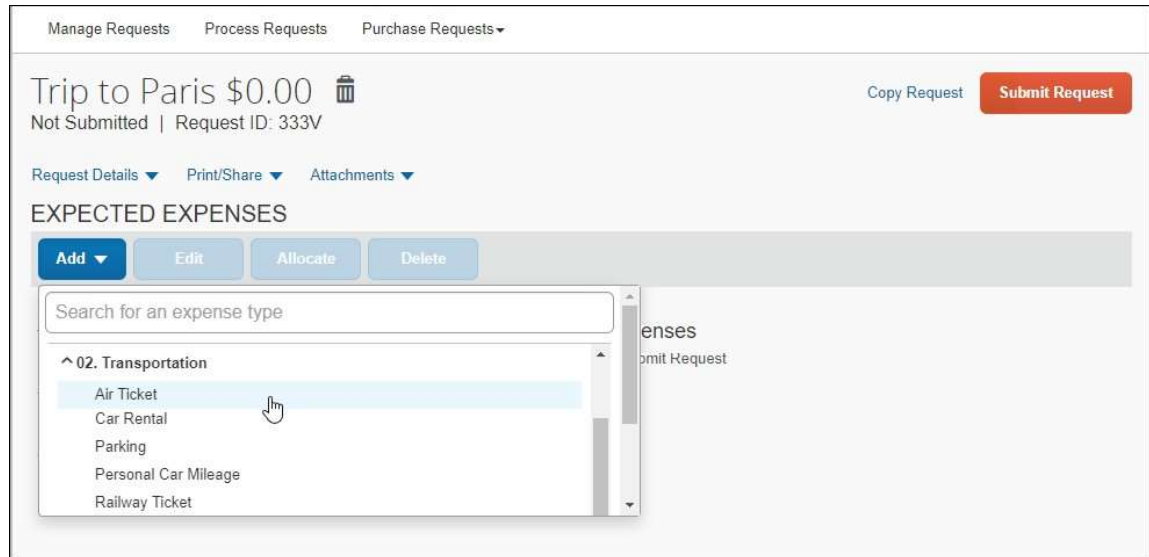
NextGen UI

In the NextGen UI for Concur Request, the term Segment is replaced with the term **Expected Expenses**.

CREATE AN EXPECTED EXPENSE – TYPICAL PROCESS

To get started, click the **Add** button to view the list of expense types and then select the applicable type.

NOTE: In the search box at the top of the list, you can enter all or part of an expected expense name.



Clicking an Expense Type opens the page for the selected type.

Manage Requests Process Requests Purchase Requests ▾

New Expense: Air Ticket Cancel **Save**

Round Trip One Way Multi City

Outbound * Required field

From * To *

Date * Depart at * Comment

Return

Date * Depart at * Comment

Amount * Currency *

NOTE: The fields that appear on this page are configurable by your company, so yours may be different from the one shown here.

Complete the fields and click **Save** and it will be added to the **Expected Expenses** list.

Manage Requests Process Requests Purchase Requests ▾

Trip to Paris \$629.50

Not Submitted | Request ID: 333V Copy Request **Submit Request**

Request Details ▾ Print/Share ▾ Attachments ▾

EXPECTED EXPENSES

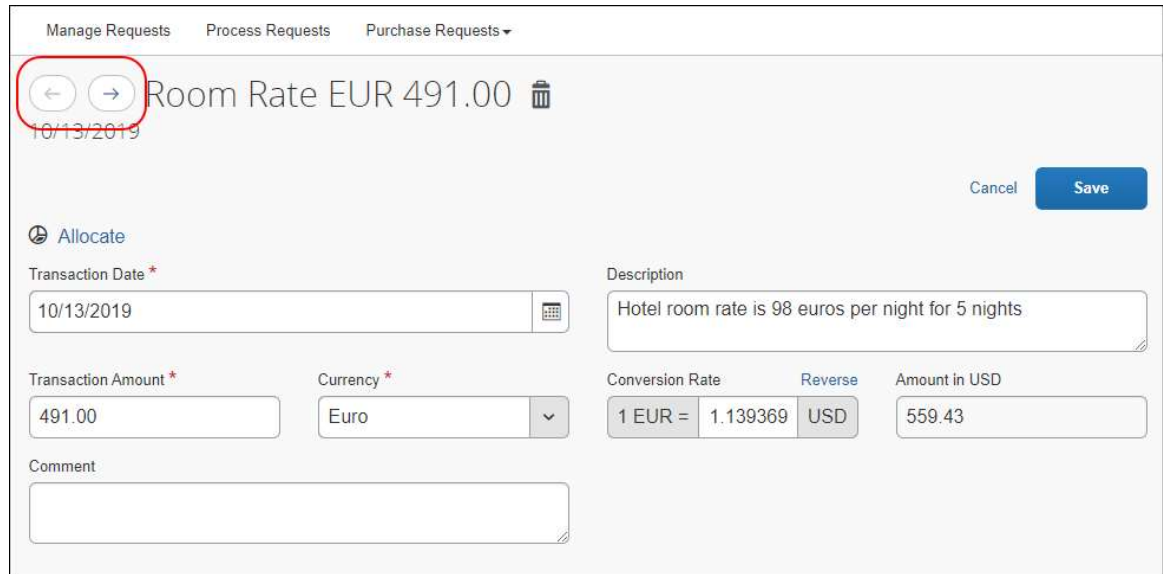
Add ▾ Edit Allocate Delete

<input type="checkbox"/>	Expense type	Details	Date ▾	Amount	Requested
<input type="checkbox"/>	Air Ticket	Seattle (SEA) - Paris (CDG), Round Trip	10/14/2019	\$629.50	\$629.50

Estimated Total: \$629.50

Navigating Between Expected Expenses

If a request contains multiple expected expenses, left and right navigation arrows are displayed to the left of each expected expense name in the request. The navigation arrows allow you to quickly navigate between the expected expenses in the request without having to return to the **Expected Expenses** page.



The screenshot shows a SAP Concur Request form for a "Room Rate EUR 491.00" transaction dated 10/13/2019. The form includes fields for Transaction Date, Transaction Amount (491.00), Currency (Euro), and Description ("Hotel room rate is 98 euros per night for 5 nights"). It also displays a Conversion Rate of 1 EUR = 1.139369 USD, resulting in an Amount in USD of 559.43. A red circle highlights the left and right navigation arrows located to the left of the expense name.

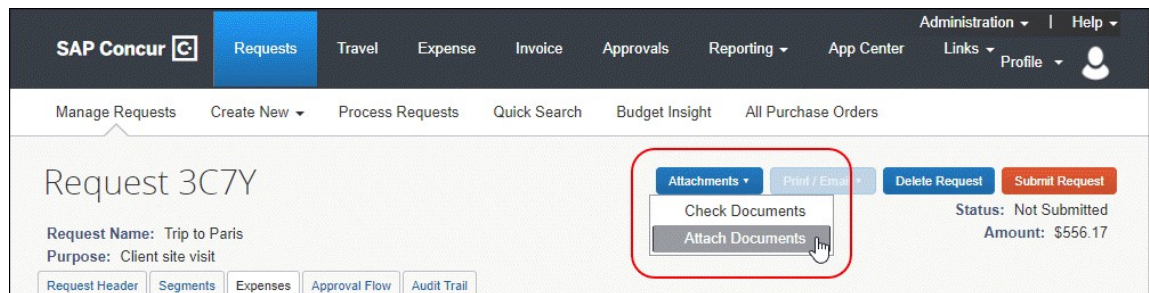
For the first expected expense in the request, the left navigation arrow will be disabled. For the last expected expense in the request, the right navigation arrow will be disabled.

Attachments

The process for adding attachments, such as an image or PDF, to a request is the same in the NextGen UI for Concur Request.

Existing UI

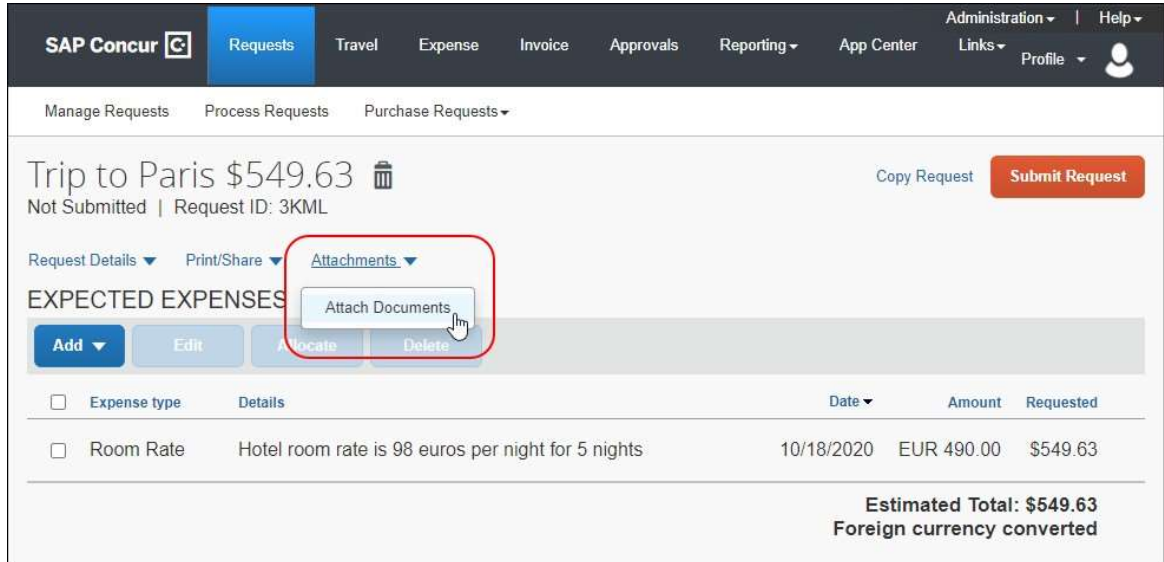
In the existing UI, attachments are added to the request by clicking *Attach Documents* in the **Attachments** list on the **Request** page.



The screenshot shows the SAP Concur Request page for "Request 3C7Y". The page includes a navigation bar with "Requests" selected. The main content area shows the request details: "Request Name: Trip to Paris" and "Purpose: Client site visit". A red circle highlights the "Attachments" dropdown menu, which contains "Check Documents" and "Attach Documents" options. The status is "Not Submitted" and the amount is "\$556.17".

NextGen UI

In the NextGen UI for Concur Request, attachments are added to the request by clicking *Attach Documents* in the **Attachments** menu on the **Expected Expenses** page.

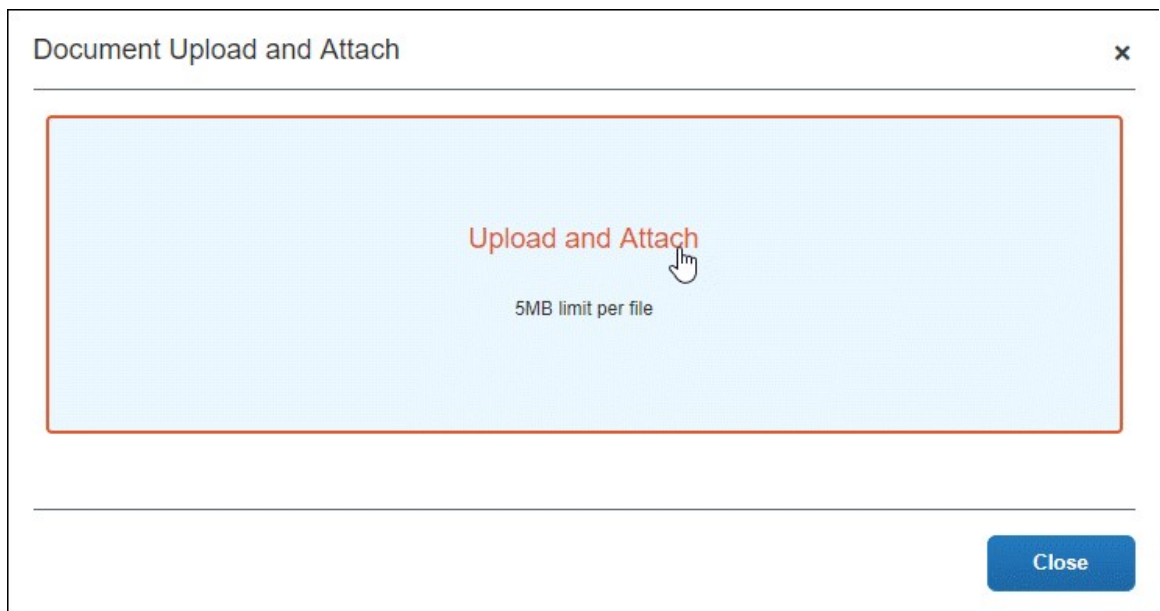


The screenshot shows the SAP Concur NextGen UI interface. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals', 'Reporting', 'App Center', 'Administration', and 'Help'. Below the navigation bar, there are tabs for 'Manage Requests', 'Process Requests', and 'Purchase Requests'. The main content area displays a request titled 'Trip to Paris \$549.63' with a trash icon, 'Not Submitted | Request ID: 3KML', and buttons for 'Copy Request' and 'Submit Request'. Underneath, there are options for 'Request Details', 'Print/Share', and 'Attachments'. The 'Attachments' menu is open, showing 'Attach Documents' as the selected option. Below this, there are buttons for 'Add', 'Edit', 'Allocate', and 'Delete'. A table lists the expected expenses:

<input type="checkbox"/>	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Room Rate	Hotel room rate is 98 euros per night for 5 nights	10/18/2020	EUR 490.00	\$549.63


Estimated Total: \$549.63
Foreign currency converted

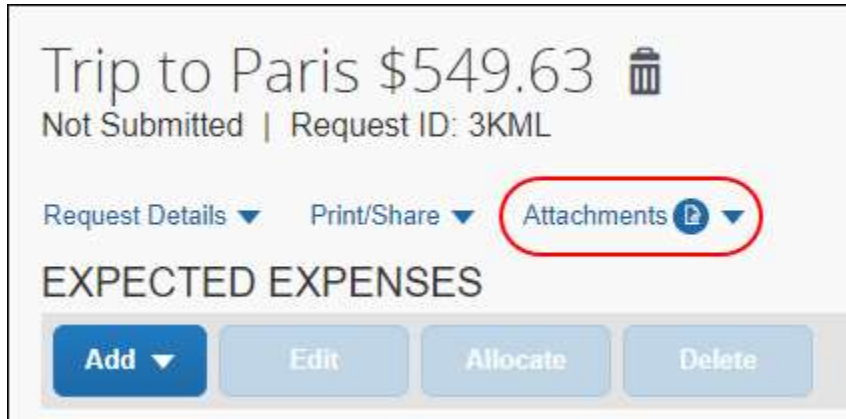
Clicking *Attach Documents* opens the **Document Upload and Attach** dialog.



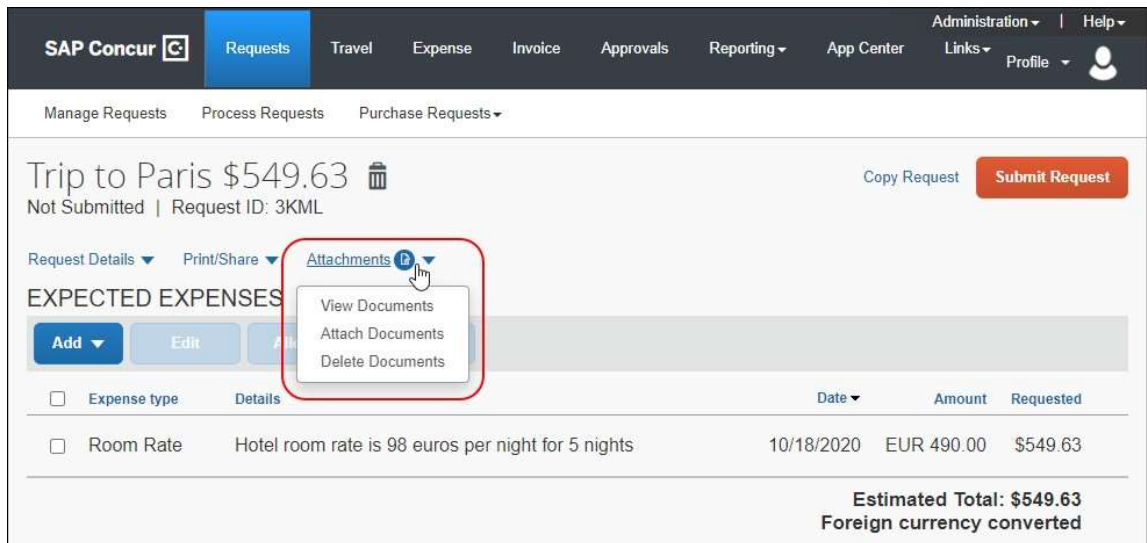
The screenshot shows the 'Document Upload and Attach' dialog box. The dialog has a title bar with 'Document Upload and Attach' and a close button (X). The main content area is a large light blue rectangle with the text 'Upload and Attach' in red and '5MB limit per file' below it. A hand cursor is pointing at the 'Upload and Attach' text. At the bottom right, there is a blue 'Close' button.

Click **Upload and Attach** to add an attachment to the request.

After adding an attachment to a request, the attachments icon, , is displayed next to the **Attachments** menu to indicate that the request has attachments.



You can view, delete, or add additional attachments from the **Attachments** menu.



Recently Used Feature for List Fields

List fields on the Concur Request forms display the most recently used selections when filling out a list field. When you click in a list field, the most recently used selections are displayed under **Recently Used** at the top of the list of selections.

The Recently Used feature is available for list and connected list fields configured in Forms and Fields (**Administration > Request > Forms and Fields**) and all location list fields. The Recently Used feature is available for these fields on the request header, segment, and expected expense forms.

The Recently Used feature is not currently available for country/region, currency, policy, or vendor list fields.

The most recently used selections for a list field are displayed under **Recently Used** in a list field's list of selections.



The screenshot shows the 'Edit Request Header' form for request TVR-13070-001 (ID: 39M6). The 'Main Destination City' dropdown is open, displaying a 'Recently Used' section with three entries: Charles De Gaulle Intl (Airport - CDG), Paris, FRANCE; Eragny Sur Oise, FRANCE; and Haneda (Airport - HND), Tokyo, JAPAN. Below these is a 'No Results Found' message. Other fields include Request Id (39M6), Request Name (TVR-13070-001), Start Date, End Date, Main Destination Country (AFGHANISTAN), Item 02 ((IT1.1) Items 1.1), External list (Search by Code), and Comment.

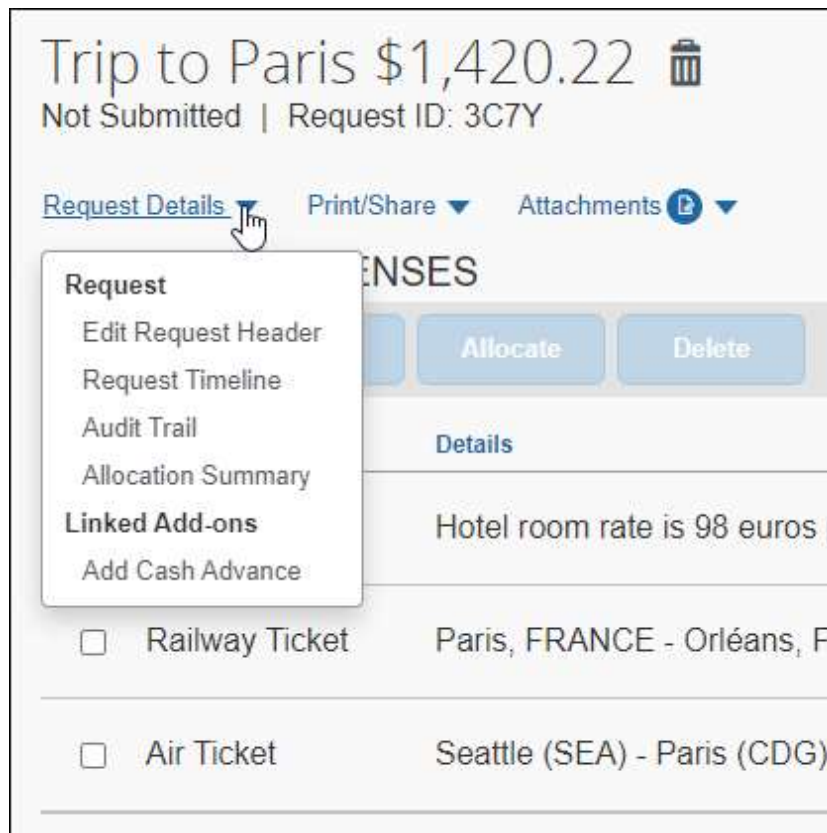
If no selections have been made for a list field before, the **Recently Used** list is not displayed at the top of the list field's list of selections.

The screenshot shows the 'Fuel' dropdown menu. The selected item is '(Diesel) Diesel'. The dropdown list contains two items: '(Diesel) Diesel' and '(Petrol) Petrol'. There is no 'Recently Used' section visible at the top of the list.

Section 4: Additional Menus on the Request

The following menus appear on the request:

- **Request Details:** The **Request Details** menu is a new menu in the NextGen UI for Concur Request. The menu contains selections for editing the request header, accessing the request timeline, otherwise known as the approval flow in the existing UI, and audit trail
-  For more information about the request timeline, refer to the *Approval Flow/Request Timeline* section in this guide.
-  For more information about the audit trail, refer to the *Audit Trail* section in this guide.



- **Print** or **Print/Share**: On the **Print** and **Print/Share** menu, the options should be the same as your current menu. The **Print/Email** menu in the existing UI is named **Print/Share** in the NextGen UI for Concur Request.

Trip to Paris \$1,420.22

Not Submitted | Request ID: 3C7Y

Request Details [Print/Share](#) Attachments

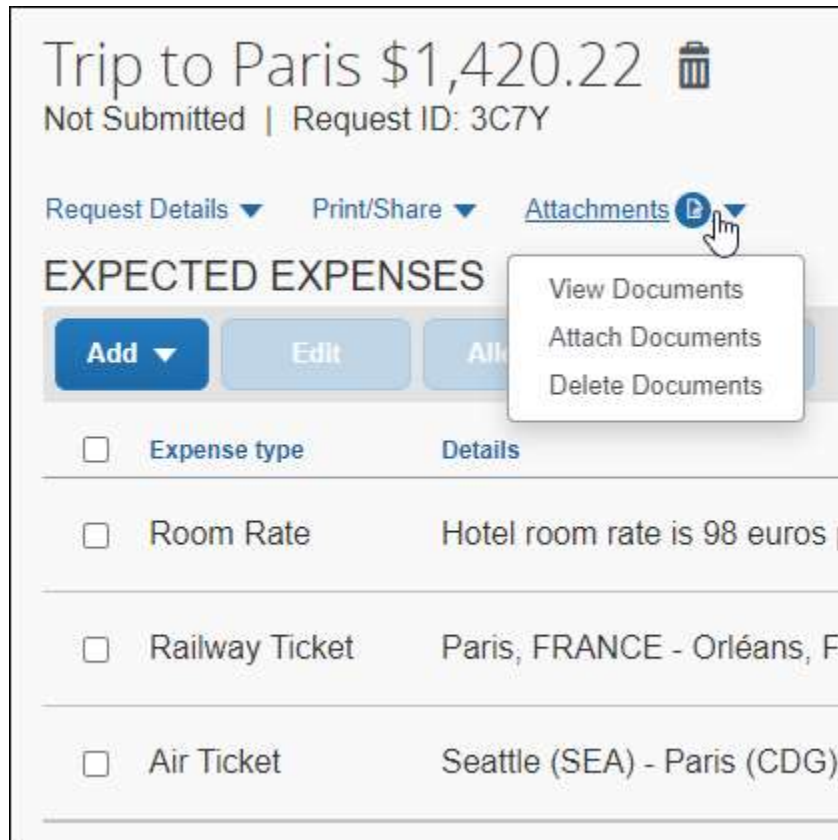
EXPECTED E

Request Post-Approved Amount

Add Edit Allocate Delete

<input type="checkbox"/>	Expense type	Details
<input type="checkbox"/>	Room Rate	Hotel room rate is 98 euros
<input type="checkbox"/>	Railway Ticket	Paris, FRANCE - Orléans, F
<input type="checkbox"/>	Air Ticket	Seattle (SEA) - Paris (CDG)

- **Attachments:** On the **Attachments** menu, the options should be the same as your current menu. The *View Documents in a new window* selection in the existing UI is named *View Documents* in the NextGen UI for Concur Request.



NOTE: The options in these lists are configurable by your company so yours may be different from what is shown here.

Section 8: Approvals

The Approvals UI and functionality in the NextGen UI for Concur Request is very similar to the existing UI.

Existing UI

In the existing UI, the **Requests** tab on the **Approvals** page looks like this.

The screenshot shows the SAP Concur interface for the Approvals page. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals' (highlighted), 'Reporting', 'App Center', and 'Links'. The main content area is titled 'Approvals' and features a summary of request counts for various categories: Trips (00), Requests (06), Expense Reports (106), Cash Advances (01), Purchase Requests (00), and Invoices (07). Below this is a 'Requests' section with a table of request details.

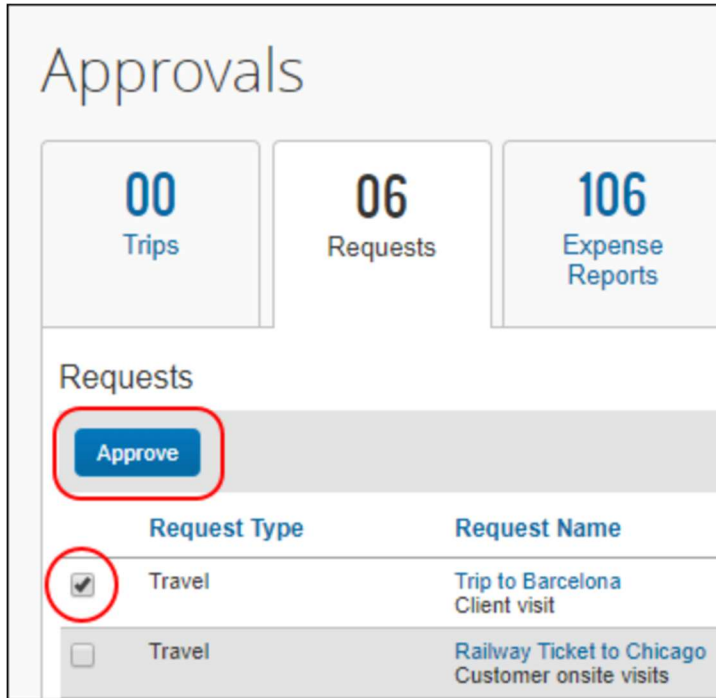
Request Type	Request Name	Request ID	Employee	Request Dates	Date Submitted	Total
Travel	Trip to Barcelona Client visit	3F7G	Terry, Brown	10/14/2019 10/15/2019	09/30/2019	\$288.96
Travel	Railway Ticket to Chicago Customer onsite visits	3F6Y	Terry, Brown	10/07/2019 10/18/2019	04/22/2019	\$160.00
Travel	Trip to Paris Sales conference	3F7F	Terry, Brown	09/30/2019 10/04/2019	09/30/2019	\$841.71
Travel	December Sales Meeting Sales meeting	34PF	Terry, Brown	12/19/2016 12/21/2016	12/06/2016	\$700.00
Travel	Trip from Seattle to San Francisco Testing	337Y	Terry, Brown	05/28/2016 05/27/2016	05/17/2016	\$580.67
Travel	Trip to Denver Sales conference	333U	Terry, Brown	09/28/2015 10/02/2015	06/24/2015	\$300.00

In both the existing UI and the NextGen UI for Concur Request, you can access the **Approvals** page by clicking the **Approvals** tab or clicking the **Authorizations Requests** link under **Required Approvals** in the **My Tasks** section of the SAP Concur home page.

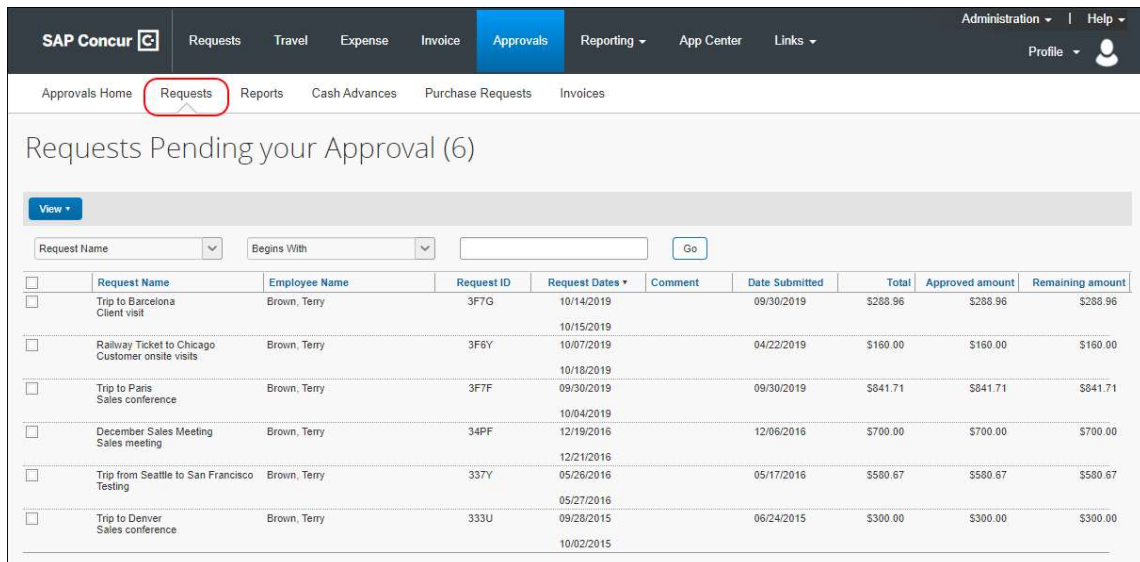
The screenshot displays the SAP Concur home page. At the top, there is a navigation bar with the SAP Concur logo and several menu items: Requests, Travel, Expense, Invoice, Approvals, and Reports. Below the navigation bar, the user's name 'Hello, Pat' is visible, along with a 'New' button. The main content area is divided into two sections: 'TRIP SEARCH' and 'MY TASKS'. The 'TRIP SEARCH' section includes a 'Mixed Flight/Train Search' form with options for 'Round Trip', 'One Way', and 'Multi City'. It also has fields for 'From' and 'To' (departure and arrival city, airport, or train station) and a 'Search' button. The 'MY TASKS' section shows a '99+' badge for 'Required Approvals' with a right-pointing arrow. Below this, there is a list of tasks: 'Authorization Requests' (06), 'Expense Reports' (106), 'Cash Advances' (01), and 'Invoices' (07). The 'Authorization Requests' item is highlighted with a red rectangular box.

Task Category	Count
Authorization Requests	06
Expense Reports	106
Cash Advances	01
Invoices	07

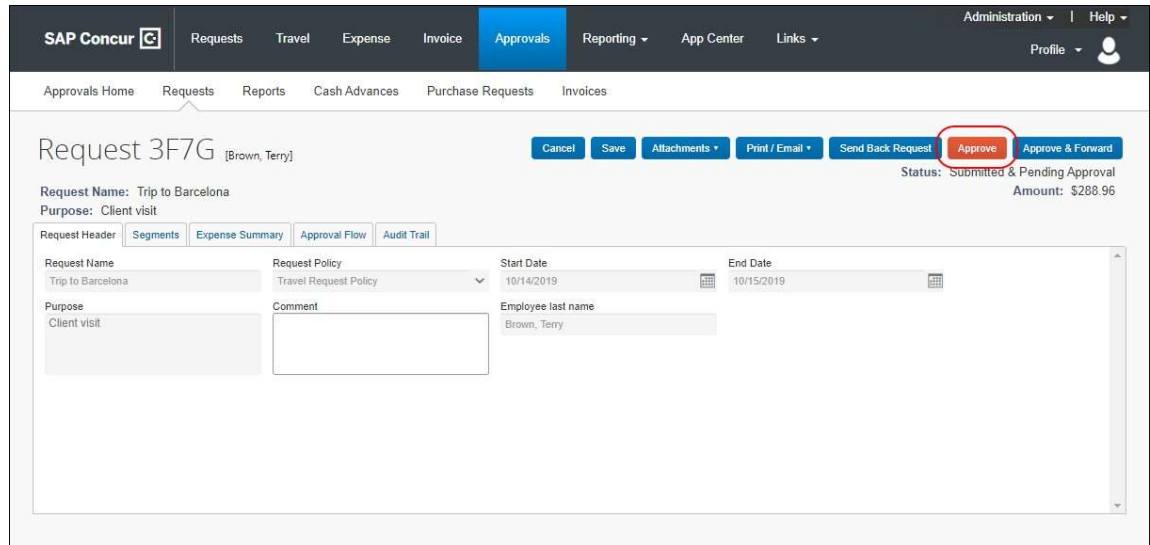
You can select the check box for a request and click **Approve** to approve the request or open the request and approve the request from within the request.



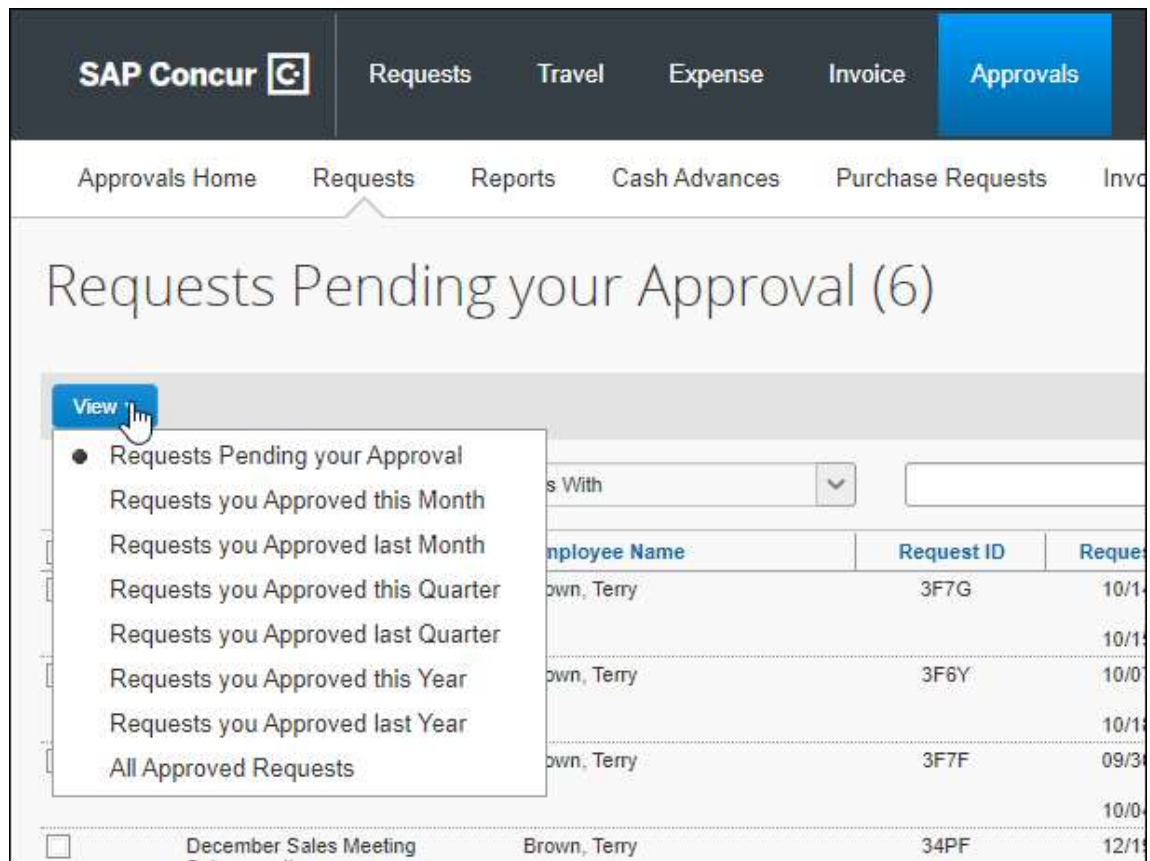
Clicking **Requests** at the top of the **Approvals** page opens the **Requests Pending your Approval** page.



Clicking the row for a request opens the **Request Header** tab for the request. You can click **Approve** or **Approve & Forward** to approve the request from within the request.



On the **Requests Pending your Approval** page, you can open the view list to view the approved requests or navigate back to the **Requests Pending your Approval** page.



NextGen UI

In the NextGen UI for Concur Request, the **Requests** tab on the **Approvals** page looks and behaves the same as it does in the existing UI. To open an individual request, click the request link in the **Request Name** or **Request ID** column.

The screenshot shows the SAP Concur interface with the 'Approvals' tab selected. At the top, there are navigation tabs for 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals', 'Reporting', 'App Center', and 'Links'. Below these, there are sub-tabs for 'Approvals Home', 'Requests', 'Reports', 'Cash Advances', 'Purchase Requests', and 'Invoices'. The main content area displays a summary of request counts for various categories: Trips (00), Requests (06), Expense Reports (106), Cash Advances (01), Purchase Requests (00), and Invoices (07). Below this summary is a table titled 'Requests' with a 'Approve' button. The table lists several travel-related requests with columns for Request Type, Request Name, Request ID, Employee, Request Dates, Date Submitted, and Total amount.

Request Type	Request Name	Request ID	Employee	Request Dates	Date Submitted	Total
Travel	Trip to Barcelona Client visit	3F7G	Terry, Brown	10/14/2019 - 10/15/2019	09/30/2019	\$288.96
Travel	Railway Ticket to Chicago Customer onsite visits	3F6Y	Terry, Brown	10/07/2019 - 10/18/2019	04/22/2019	\$160.00
Travel	Trip to Paris Sales conference	3F7F	Terry, Brown	09/30/2019 - 10/04/2019	09/30/2019	\$841.71
Travel	December Sales Meeting Sales meeting	34PF	Terry, Brown	12/19/2016 - 12/21/2016	12/06/2016	\$700.00
Travel	Trip from Seattle to San Francisco Testing	337Y	Terry, Brown	05/26/2016 - 05/27/2016	05/17/2016	\$580.67
Travel	Trip to Denver Sales conference	333U	Terry, Brown	09/28/2015 - 10/02/2015	06/24/2015	\$300.00

Clicking **Requests** at the top of the **Approvals** page opens the **Requests Pending your Approval** page.

The screenshot shows the SAP Concur interface with the 'Requests' tab selected. The main content area displays a table titled 'View: Requests Pending your Approval'. The table lists several travel-related requests with columns for Request Name, Employee Name, Request Dates, Comment, Date Submitted, Total, Approved amount, and Remaining amount. The 'Requests' tab in the top navigation bar is circled in red.

Request Name	Employee Name	Request Dates	Comment	Date Submitted	Total	Approved amount	Remaining amount
Trip to Barcelona ID: 3F7G	Brown, Terry	10/14/2019 - 10/15/2019		06/05/2020	\$288.96	\$288.96	\$288.96
Railway Ticket to Chicago ID: 3F6Y	Brown, Terry	10/07/2019 - 10/18/2019		04/22/2019	\$160.00	\$160.00	\$160.00
Trip to Paris ID: 3F7F	Brown, Terry	09/30/2019 - 10/04/2019		06/05/2020	\$841.71	\$841.71	\$841.71
December Sales Meeting ID: 34PF	Brown, Terry	12/19/2016 - 12/21/2016		12/06/2016	\$700.00	\$700.00	\$700.00
Trip from Seattle to San Francisco ID: 337Y	Brown, Terry	05/26/2016 - 05/27/2016		05/17/2016	\$580.67	\$580.67	\$580.67
Trip to Denver ID: 333U	Brown, Terry	09/28/2015 - 10/02/2015		06/24/2015	\$300.00	\$300.00	\$300.00

On the **Requests Pending your Approval** page, you can open the view list to view approved requests or navigate back to the **Requests Pending your Approval** page.

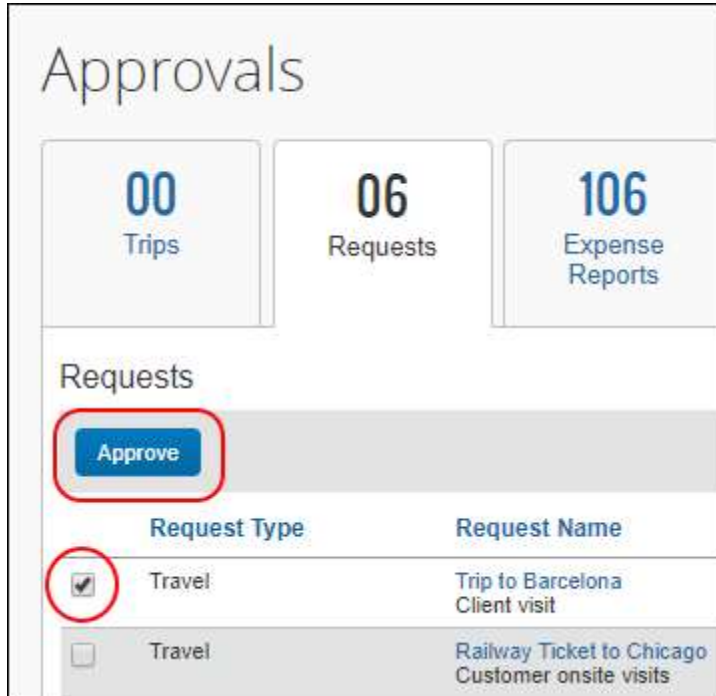
The screenshot shows the SAP Concur interface with the 'Approvals' tab selected. The 'View:' dropdown menu is open, displaying a list of view options. The 'Requests Pending your Approval' option is selected and highlighted. The background shows a table of requests with columns for 'Request ID', 'Employee Name', and 'Request Dates'.

Request ID	Employee Name	Request Dates
Trip to ID: 3F	Terry	10/14/2019 - 10/15/2019
Railw ID: 3F	Terry	10/07/2019 - 10/18/2019
Trip to ID: 3F	Terry	09/30/2019 - 10/04/2019
December Sales Meeting	Brown, Terry	12/19/2016 - 12/21/2016

Approving a Request

You can approve a request from the **Approvals** page or from within a request.

To approve a request from the **Approvals** page, select the check box for the request and then click **Approve**.



To approve a request from within a request, open the **Expected Expenses** page, and then click **Approve**.

To open the **Expected Expenses** page for a request from the **Approvals** page, click the request link in the **Request Name** or **Request ID** column.

To open the **Expected Expenses** page for a request from the **Requests Pending your Approval** page, click the request link in the **Request Name** column.

The screenshot shows the SAP Concur interface for a request titled "Trip to Barcelona \$288.96". The request is in a "Submitted & Pending Approval" state with Request ID: 3F7G. The "Expected Expenses" section contains the following table:

Expense type	Details	Date	Amount	Requested
Breakfast	Breakfast 10/15/19	10/15/2019	EUR 11.00	\$12.04
Train	Train to Barcelona	10/14/2019	EUR 162.00	\$177.32
Fixed Lodging	Hotel	10/14/2019	EUR 78.00	\$85.37
Dinner	Dinner 10/14/19	10/14/2019	EUR 13.00	\$14.23

Estimated Total: \$288.96
Foreign currency converted

Approving and Forwarding a Request

In the existing UI, you can approve and forward a request to another approver using the **Approve & Forward** button in a request. In the NextGen UI for Concur Request, you use the **More Actions > Edit Approval Flow** selection.

To approve and forward a request to another approver

1. Open the request from the **Approvals** or **Requests Pending your Approval** page.
2. Click **More Actions > Edit Approval Flow**.

The screenshot shows the same SAP Concur interface as above, but with the "More Actions" dropdown menu open. The menu options are "Edit Approval Flow" and "Send Back to Employee". A mouse cursor is pointing at the "Edit Approval Flow" option.

3. In the **Edit Approval Flow** dialog, click **Add Step**.

Dialog: Edit Approval Flow

Manager Approval

Davis, Pat

+ Add Step

Approved - Pending Booking

+ Add Step

Cancel Save

4. In the **User-Added Approver** field, start typing the approver's name to search for the additional approver, and then click their name to populate the field.

Dialog: Edit Approval Flow

Manager Approval

Davis, Pat

+ Add Step

User-Added Approver

collin Delete

+ Add Step

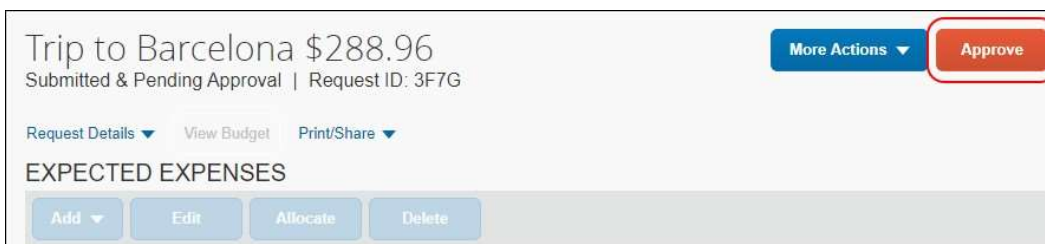
Collins, Chris L. (cc@commasavvy.com)
Employee ID: ChrisCollins Logon ID: cc@CommaSavvy.com
cc@CommaSavvy.com

+ Add Step

Cancel Save

5. Click **Save**.

6. Click **Approve**.



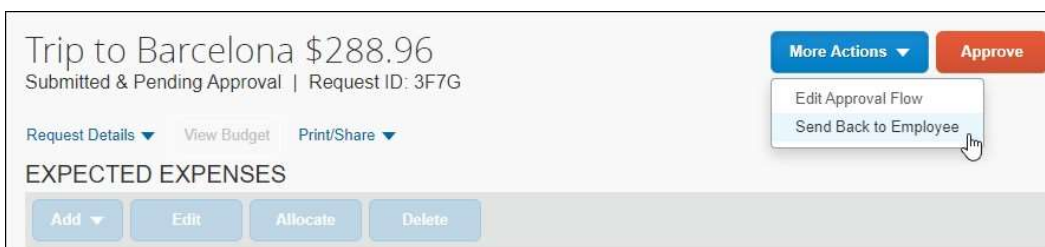
The request is approved and forwarded to the next approver.

Sending a Request Back to Submitter

In the existing UI, you can send a request back to the submitter using the **Send Back Request** button in a request. In the NextGen UI for Concur Request, you use the **More Actions > Send Back to Employee** selection.

To send a request back to the request submitter

1. Open the request from the **Approvals** or **Requests Pending your Approval** page.
2. Click **More Actions > Send Back to Employee**.



3. In the **Send Back to Employee** dialog, click enter the reason you are sending the request back, and then click **Send Back**.

Send Back to Employee

Comment History

No comments.


Add Comment

Reason for Sending Back the Request*

Please provide the name of the hotel where you will be staying

Cancel Send Back

The request is sent back to the request submitter.

After sending back a request to the submitter, when the request submitter resubmits the request, the resubmitted icon, , is displayed for the request on the **Approvals > Approvals Home** page.

Approvals Home Requests Reports Cash A

Approvals

00 Trips 06 Requests 106 Expense Reports

Requests

Approve

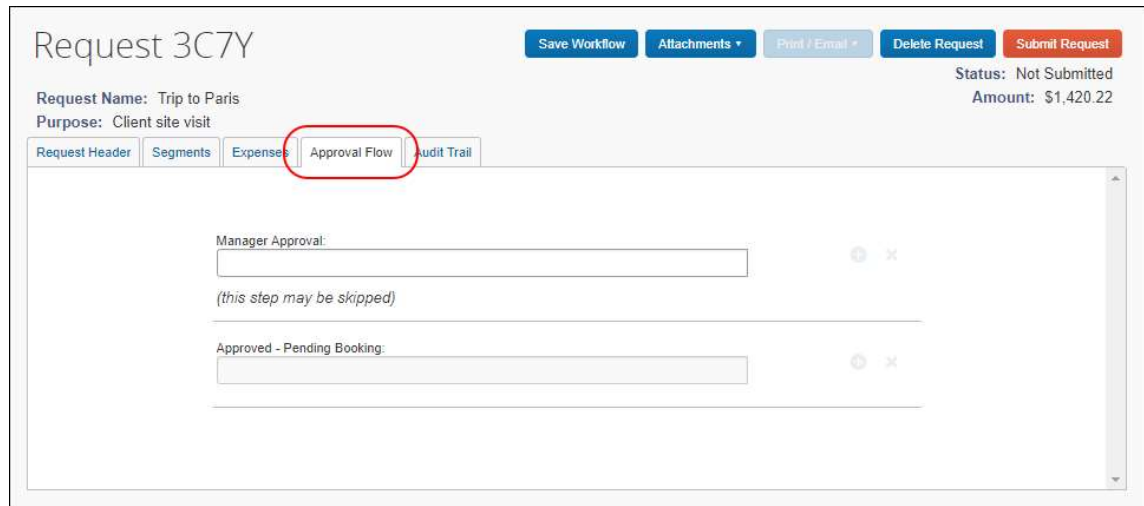
	Request Type	Request Name
<input checked="" type="checkbox"/>	Travel	Trip to Barcelona Client visit
<input type="checkbox"/>	Travel	Railway Ticket to Chica Customer onsite visits
<input checked="" type="checkbox"/>	Travel	Trip to Paris Sales conference
<input type="checkbox"/>	Travel	December Sales Meeti Sales meeting

Section 9: Approval Flow/Request Timeline

The Approval Flow feature in the existing UI has a new name, Request Timeline, and new location in the NextGen UI for Concur Request. The **Request Timeline** option shows approval workflow and comments for the request.

Existing UI

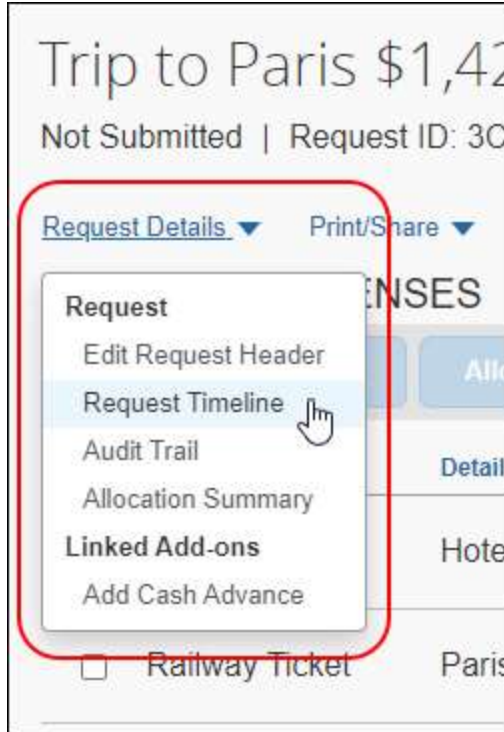
In the existing UI, you can view a request's approval workflow from the **Approval Flow** tab on the **Request** page.



The screenshot displays the 'Request 3C7Y' page in the existing UI. At the top, there are several action buttons: 'Save Workflow', 'Attachments', 'Print / Email', 'Delete Request', and 'Submit Request'. Below these, the request details are shown: 'Request Name: Trip to Paris' and 'Purpose: Client site visit'. The status is 'Not Submitted' and the amount is '\$1,420.22'. A navigation bar contains tabs for 'Request Header', 'Segments', 'Expenses', 'Approval Flow', and 'Audit Trail'. The 'Approval Flow' tab is selected and highlighted with a red circle. The main content area shows two approval steps: 'Manager Approval' and 'Approved - Pending Booking'. Each step has a text input field and a small icon with a plus and minus sign. A note below the first step states '(this step may be skipped)'. The page has a light gray background and a clean, professional layout.

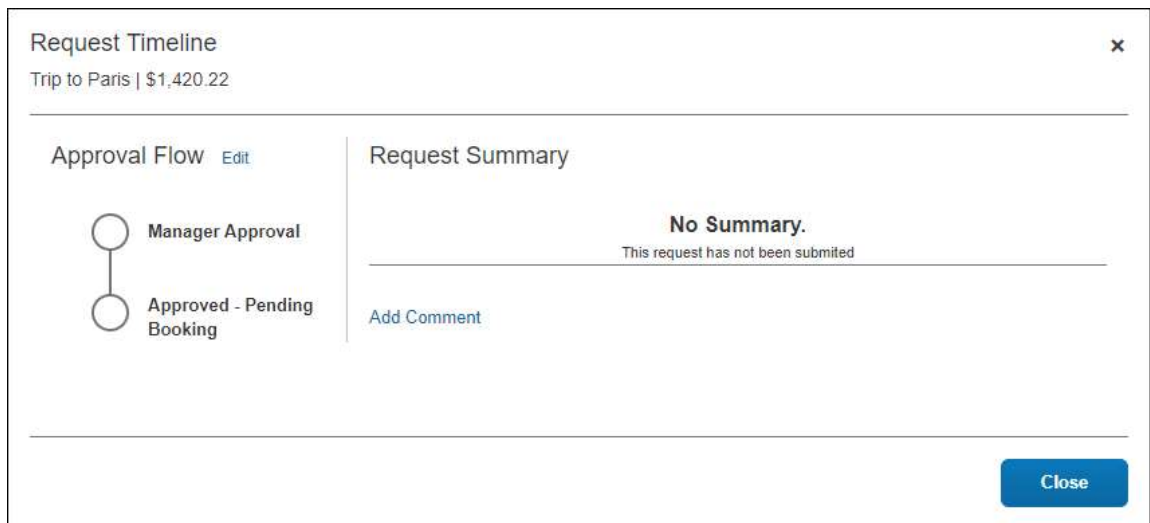
NextGen UI

In the NextGen UI for Concur Request, you can view a request's approval workflow and comments from the **Request Timeline** page. To access the **Request Timeline** page, on the **Request Details** menu, click *Request Timeline*.

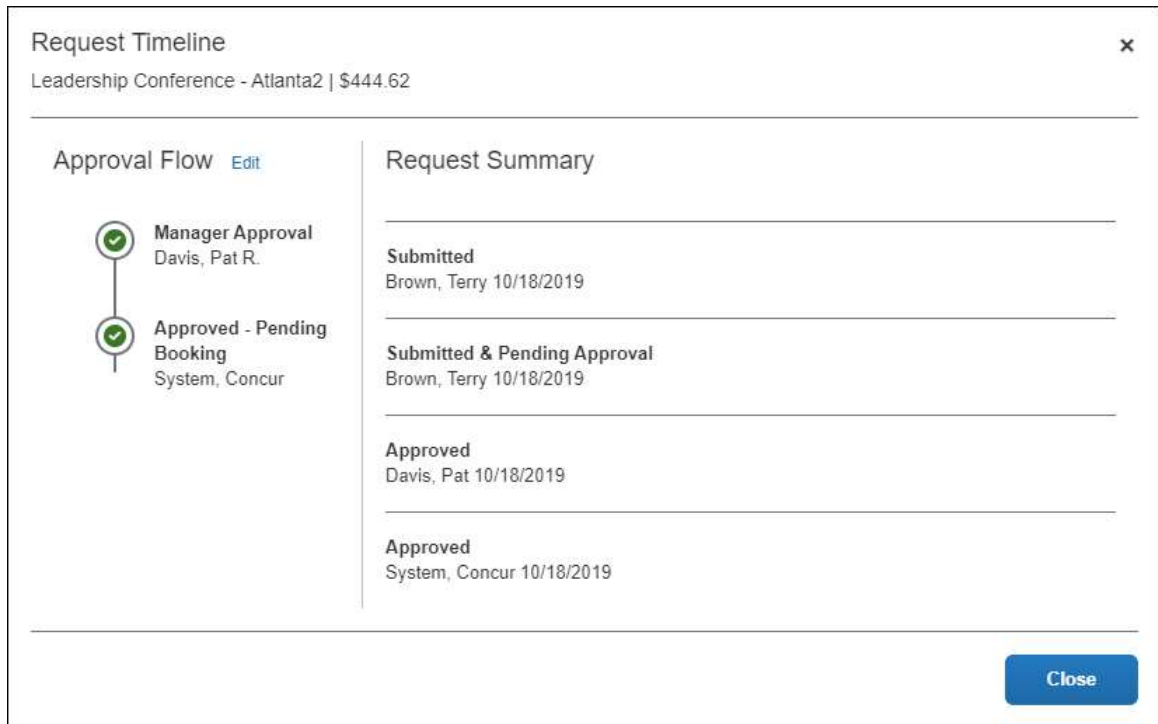


The **Request Timeline** page displays the approval workflow for the request, a summary of the approval activity for the request, and any comments added to the request.

This is the **Request Timeline** page for an unsubmitted request.



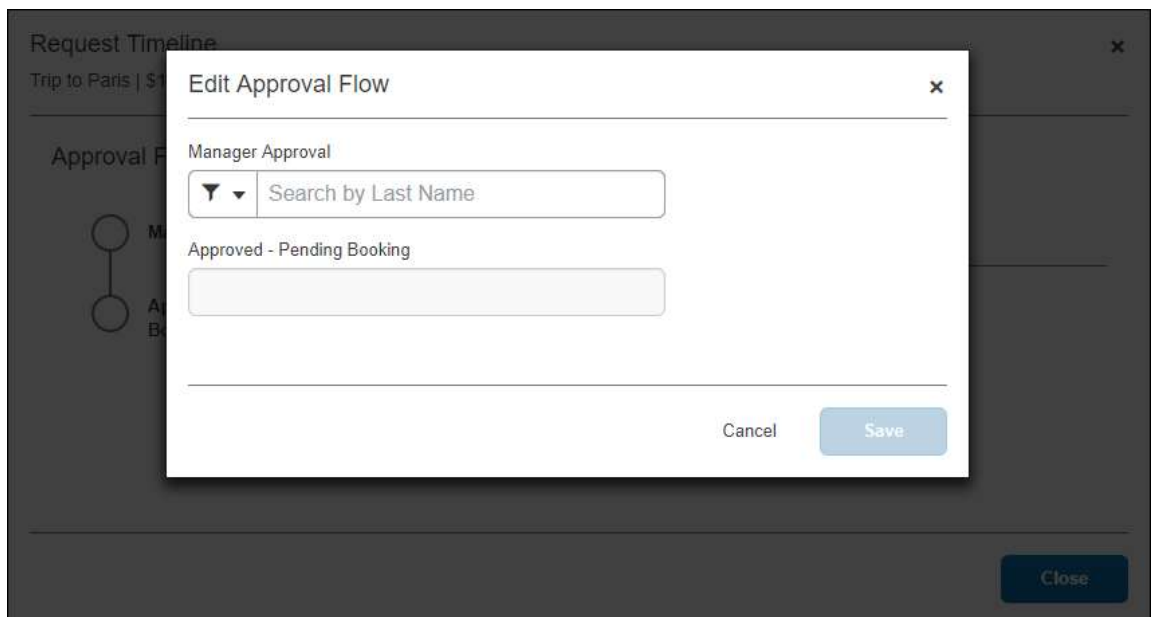
This is the **Request Timeline** page for a submitted and approved request.



The screenshot shows a window titled "Request Timeline" with a close button (x) in the top right corner. Below the title bar, the text "Leadership Conference - Atlanta2 | \$444.62" is displayed. The main content is divided into two columns. The left column, titled "Approval Flow" with an "Edit" link, shows a vertical flow of two steps: "Manager Approval" by "Davis, Pat R." and "Approved - Pending Booking" by "System, Concur". Both steps are marked with a green checkmark icon. The right column, titled "Request Summary", lists the following items: "Submitted" by "Brown, Terry" on "10/18/2019"; "Submitted & Pending Approval" by "Brown, Terry" on "10/18/2019"; "Approved" by "Davis, Pat" on "10/18/2019"; and "Approved" by "System, Concur" on "10/18/2019". A blue "Close" button is located at the bottom right of the window.

If you do not have a request approver assigned to you or have permissions to change the request approver, click the **Edit** link on the **Request Timeline** page to add or edit the request approver.

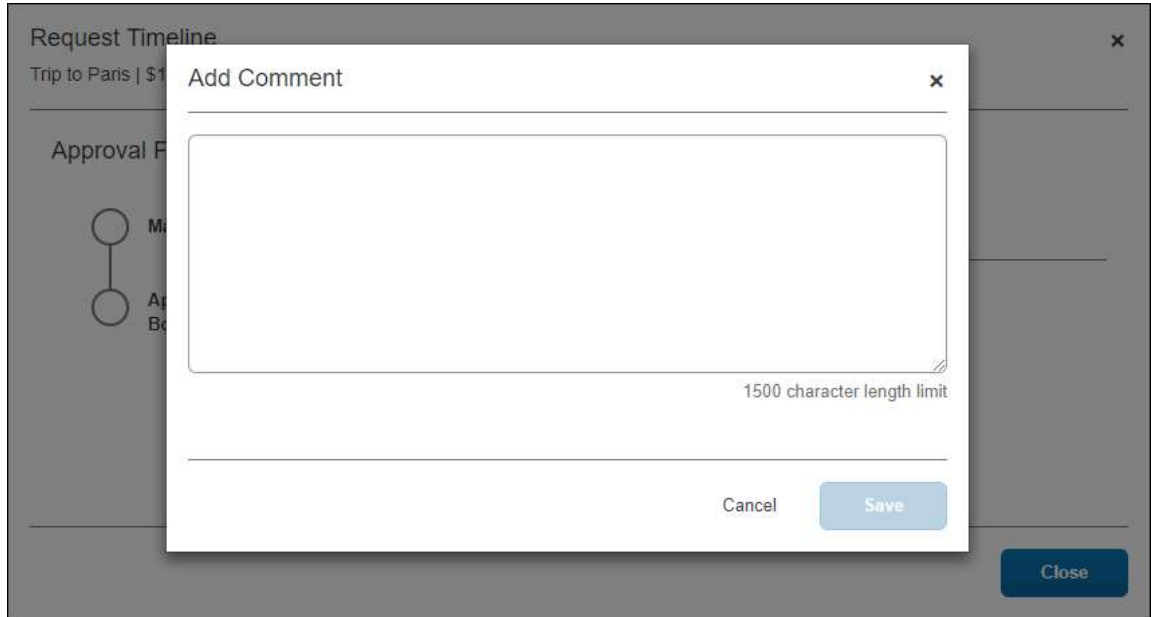
Clicking the **Edit** link opens the **Edit Approval Flow** dialog.



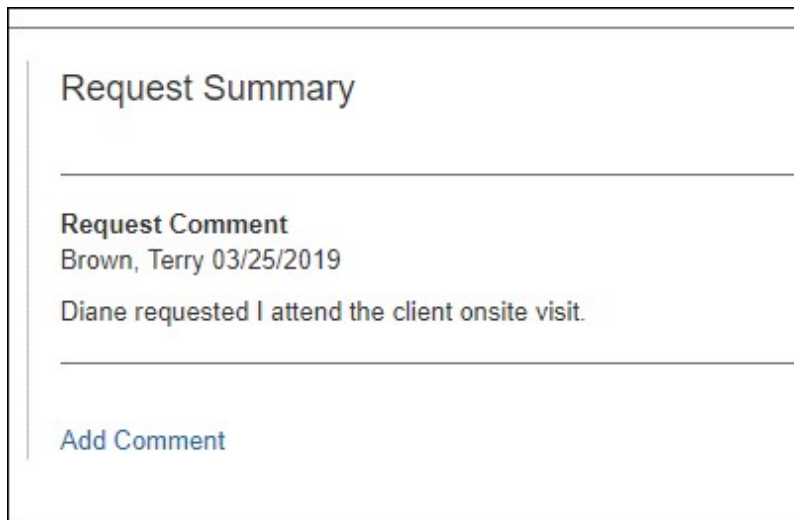
The screenshot shows a dialog box titled "Edit Approval Flow" with a close button (x) in the top right corner. The dialog is overlaid on a dimmed background of the "Request Timeline" page. The dialog contains two sections: "Manager Approval" and "Approved - Pending Booking". Each section has a search input field with a dropdown arrow and the text "Search by Last Name". At the bottom of the dialog, there are "Cancel" and "Save" buttons. A blue "Close" button is also visible at the bottom right of the background window.

You can add comments to the request by clicking the **Add Comment** link on the **Request Timeline** page. Clicking the **Add Comment** link opens the **Add Comment** dialog.

Enter a comment and click **Save**.



Saved comments are displayed in the **Request Summary** section of the **Request Timeline** page.



Section 11: Printed Report/Email Page

The printed report page for requests has a new look and feel, but is essentially the same between the existing UI and the NextGen UI for Concur Request with just a small number of changes.

Existing UI

In the existing UI, the buttons for saving the report as a PDF, emailing the report, printing the report, or closing the report are located at the top of the printed report page.

PDF	Email	Print	Close
Booking Business Travel			
Request ID : 337D			
Minimum Departure Date : 10/05/2015			
Approval Status : Submitted & Pending Approval			
Employee Name : Brown, Terry L.			
Email Address : terrybrown@randomverbs.com			
Default Manager Name : Davis, Pat R.			
Default Manager Email : patdavis@randomverbs.com			
Country of Residence : UNITED STATES			
Org Unit 1-Division : Development			
Sender Name : Brown, Terry L.			
Email Address : terrybrown@randomverbs.com			
Default Manager Name : Davis, Pat R.			
Default Manager Email : patdavis@randomverbs.com			
Country of Residence : UNITED STATES			
Org Unit 1-Division : Development			
Start Date : 10/05/2015			
End Date : 10/17/2015			
Request Policy : Default Request Policy			
Purpose : Sales Conference in Q4.			
Segments			

Segments				
Air Ticket				
Foreign Amount : \$1,000.00				
10/05/2015 Seattle Tacoma Intl (Airport - SEA), Seattle (US) – La Guardia (Airport - LGA), New York (US) Depart At: 11:00 AM				
10/17/2015 La Guardia (Airport - LGA), New York (US) – Seattle Tacoma Intl (Airport - SEA), Seattle (US) Depart At: 09:00 AM				
Allocations : 100.00% (\$1,000.00)				
Hotel Reservation				
Foreign Amount : \$2,200.00				
10/05/2015 New York-Manhattan (US) 10/17/2015				
Check-In Detail : King bed.				
Allocations : 100.00% (\$2,200.00)				
Expenses				
Transaction Date	Expense Type	Entry Description	Foreign Amount	Amount
10/05/2015	Airfare		\$1,000.00	\$1,000.00
10/05/2015	Lodging		\$2,200.00	\$2,200.00
10/05/2015	Taxi		\$100.00	\$100.00
10/06/2015	Materials		\$250.00	\$250.00
Printed on 01/29/2015 02:47 PM				

NextGen UI

In the NextGen UI for Concur Request, the buttons for saving the report as a PDF, emailing the report, printing the report, or closing the report are located at the bottom of the printed report page. In the existing UI, the button for saving the report as a PDF file is named PDF. In NextGen UI, the **PDF** button is renamed to **Save as PDF**.

Each section of the printed report page is now enclosed in an individual box to help improve the readability of the report by making each section visually distinct.

The screenshot shows a window titled "Copy of Request Printed Report" with a close button (x) in the top right corner. The report content is organized into several distinct sections, each enclosed in a box:

- Booking Business Travel**: Contains Request ID: **74R3**, Minimum Departure Date: **3/10/2019**, and Approval Status: **Submitted & Pending Approval**.
- List of Request Exceptions**: Contains a "Message" field which is currently blank.
- Employee Information**: Lists fields such as Employee Name, Email Address, Default Manager Name, Default Manager Email, Country of Residence (**AUSTRALIA**), Logical System (**SAP**), Company Code, Cost Object Type, and Cost Object Id.
- Sender Information**: Lists fields such as Sender Name, Email Address, Default Manager Name, Default Manager Email, and Country of Residence (**AUSTRALIA**).

At the bottom of the window, there are four buttons: "Close", "Print", "Save as PDF", and "Email".

Copy of Request Printed Report



TOTAL ESTIMATED AMOUNT: 3,913.95 AUD

Segments

Air Ticket

Estimated Amount : 1,093.29 EUR

3/10/2019 Charles De Gaulle Intl (Airport - CDG), Paris (FR) – Seattle Tacoma Intl (Airport - SEA), Seattle (US) Depart At: 3:00 AM

Seattle Tacoma Intl (Airport - SEA), Seattle (US) – Charles De Gaulle Intl (Airport - CDG), Paris (FR) 3/17/2019 Arrival At: 11:00 AM

Allocations : 100.00% (1,714.57 AUD) SAP-1000-CC-100040

Expenses

Transaction Date	Expense Type	Entry Description	Estimated Amount	Amount
3/17/2019	Airfare		1,093.29 EUR	1,714.57 AUD
3/16/2019			47.00 USD	65.03 AUD
3/12/2019			47.00 USD	65.03 AUD
3/12/2019			47.00 USD	65.03 AUD
3/13/2019			94.00 USD	130.06 AUD

Close

Print

Save as PDF

Email

Copy of Request Printed Report ✕

3/16/2019	[REDACTED]	94.00 USD	130.06 AUD
3/12/2019	[REDACTED]	46.00 USD	63.65 AUD
3/14/2019	[REDACTED]	46.00 USD	63.65 AUD
3/15/2019	[REDACTED]	46.00 USD	63.65 AUD
3/10/2019	[REDACTED]	46.00 USD	63.65 AUD
3/13/2019	[REDACTED]	46.00 USD	63.65 AUD
3/16/2019	[REDACTED]	46.00 USD	63.65 AUD
3/11/2019	[REDACTED]	46.00 USD	63.65 AUD

Total Posted Amount : **3,915.93 AUD**

Printed on 4/23/2019 12:48 PM

[Close](#) [Print](#) [Save as PDF](#) [Email](#)

Section 12: Audit Trail

You can view the request and expected expense-level activity for a request in the request's audit trail. The audit trail has a new location in the NextGen UI for Concur Request.

Existing UI

In the existing UI, you can view a request's audit trail from the **Audit Trail** tab on the **Request** page.

The screenshot displays the 'Request 34PF' page. At the top right, there are buttons for 'Attachments', 'Print / Email', and 'Recall'. Below these, the status is 'Submitted & Pending Approval' and the amount is '\$700.00'. The request details include 'Request Name: December Sales Meeting' and 'Purpose: Sales meeting'. A navigation bar contains tabs for 'Request Header', 'Segments', 'Expense Summary', 'Approval Flow', and 'Audit Trail', with the 'Audit Trail' tab highlighted by a red circle. Below the navigation bar, there are three sections: 'Request Level', 'Entry Level', and 'Segment Level', each with a table structure. The 'Request Level' table has two rows of data.

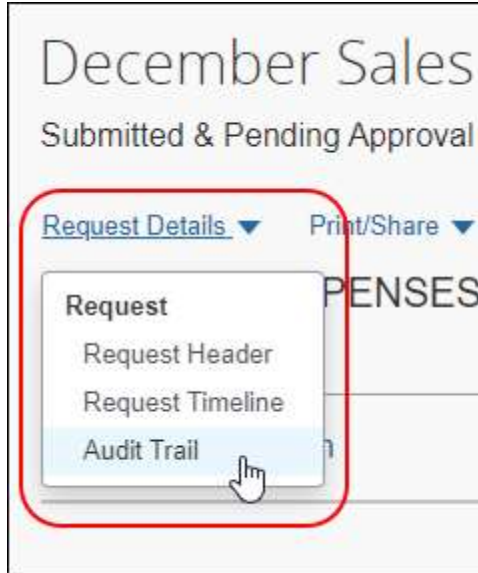
Date/Time	Updated By	Action	Description
12/06/2018 12:15 PM	Brown, Terry	Approval Status Change	Status changed from Not Submitted to Submitted Comment:
12/06/2018 12:15 PM	Brown, Terry	Approval Status Change	Status changed from Submitted to Submitted & Pending Approval Comment:

Date/Time	Updated By	Action	Description
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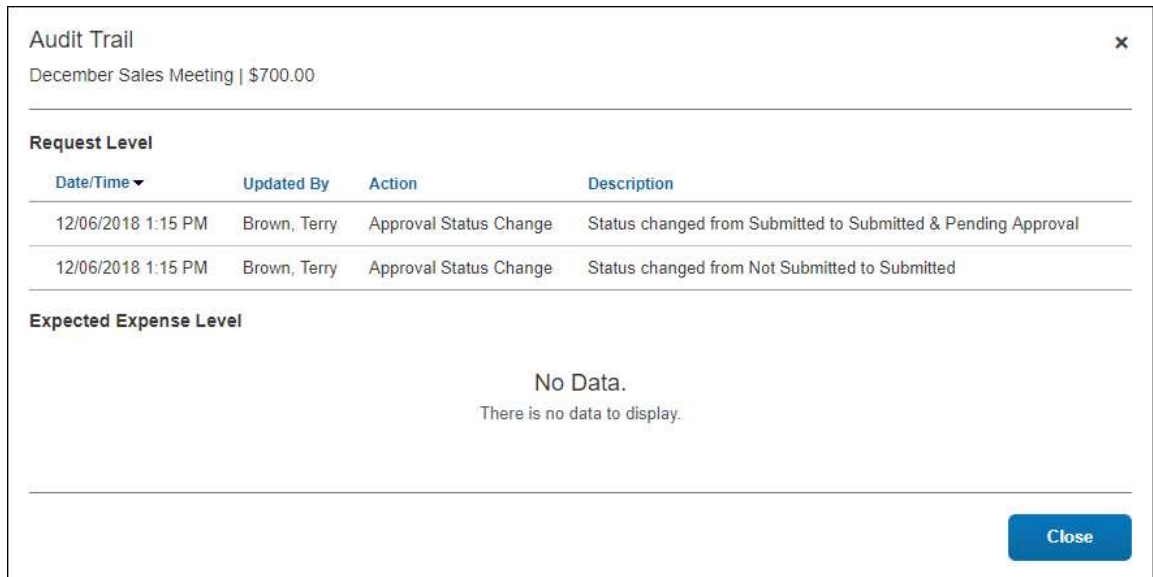
Date/Time	Updated By	Action	Description
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NextGen UI

In the NextGen UI for Concur Request, you can view a request's audit trail from the **Audit Trail** page. To access the **Audit Trail** page, on the **Request Details** menu, click *Audit Trail*.



The **Audit Trail** page displays the request name and amount and details the request-level and expected expense-level activity for the request

A screenshot of the "Audit Trail" page. The title is "Audit Trail" with a close button (X) in the top right corner. Below the title, it says "December Sales Meeting | \$700.00". The page is divided into two sections: "Request Level" and "Expected Expense Level".
Request Level
This section contains a table with the following data:

Date/Time	Updated By	Action	Description
12/06/2018 1:15 PM	Brown, Terry	Approval Status Change	Status changed from Submitted to Submitted & Pending Approval
12/06/2018 1:15 PM	Brown, Terry	Approval Status Change	Status changed from Not Submitted to Submitted

Expected Expense Level
This section displays "No Data." with the subtext "There is no data to display." at the bottom right, there is a blue "Close" button.

Section 13: Multi-Leg Flights and Rail Trips

The NextGen UI for Concur Request supports multi-leg flights and rail trips. The NextGen UI has the same multi-leg functionality as the existing UI with one new addition. In the NextGen UI for Concur Request, the destination in the **To** field of the previous leg is now auto-populated in the **From** field of the next leg of the flight or rail trip.

Existing UI

In the existing UI, you have to manually enter the previous leg's destination in the **From** field for the next leg of a flight or rail trip.

Request 3F6Y

Request Name: Railway Ticket to Chicago
Purpose: Customer onsite visits

Request Header Segments Expenses Approval Flow Audit Trail

Add Segment

CLICK ICON TO CREATE SEGMENT

Railway Ticket Round Trip One Way Multi-Segment Amount: USD

Locations Per Supplier: AMTRAK

From: Washington Union Station, DC

To: Boston-South Station, MA

Date: 10/07/2019 Depart at 07:00 am

Comment:

From:

To:

Date: Depart at

(Required field)

Comment:

From:

To:

Date: Depart at

NextGen UI

In the NextGen UI for Concur Request, the destination from the **To** field of the previous leg is automatically populated in the **From** field of the next leg of the flight or rail trip.

The screenshot displays the 'New Expense: Railway Ticket' form. At the top, there are 'Cancel' and 'Save' buttons. Below is a dropdown for 'View Service Locations For' set to 'AMTRAK'. There are three tabs: 'Round Trip', 'One Way', and 'Multi City'. The form contains three leg entries. The first leg has 'From' as 'Washington - Union Station, DC, United States of America' and 'To' as 'Boston - South Station, MA, United States of America'. The second leg has 'From' as 'Boston - South Station, MA, United States of America' and 'To' as an empty field. The third leg has 'From' and 'To' as empty fields. A red box highlights the 'To' field of the first leg and the 'From' field of the second leg, with a red arrow pointing from the first to the second, illustrating the automatic population of the 'From' field.

Section 14: Expense Reports Associated with Requests

In the NextGen UI for Concur Request, when expense reports are associated with an approved request, you can access the expense reports from within the request.

NOTE: In order to access expense reports associated with a request from within a request, Concur Request and Concur Expense must be activated and integrated.

When an expense report is associated with a request, the **REPORTS** section is displayed below the **Request Details** menu on the **Expected Expenses** page.

Alerts: 1

aaa multiple chd € 812.00
Approved | Request ID: 34RG

More Actions ▼ Create Expense Report

Request Details ▼ Print/Share ▼ Attachments ▼

REPORTS: 2
Amount
€ 812.00
€ 700.00, € 112.00

CASH ADVANCES: 2
Amount
€ 2.00
€ 1.00, € 1.00

EXPECTED EXPENSES

Expense type	Details	Date ▼	Amount	Requested
Air Ticket	Paris (CDG) - New York (JFK) : Round Trip	01/14/2020	€ 700.00	€ 700.00
Car Rental	New York-Manhattan, New York - New York-Manhattan, New York	01/14/2020	€ 100.00	€ 100.00
Breakfast		01/14/2020	€ 12.00	€ 12.00
Estimated Total:			€ 812.00	

The **REPORTS** section displays the total number of expense reports associated with the request, the total amount of the combined expense report amounts, and the individual expense report amounts.

If only one expense report is associated with the request, clicking the **REPORTS** section opens the expense report in Concur Expense.

If more than one expense report is associated with the request, clicking the **REPORTS** section opens the **REPORTS** page. The **REPORTS** page displays the list of expense reports associated with the request.

REPORTS (2) ✕

Report Name ▲	Status	Date	Approved	Requested
CMA SANDBOX ID: 39E19DD64DF04A78BD84	Not Submitted	03/22/2021	\$0.00	\$0.00
< CMA SANDBOX ID: 885A130F225A477EA716 >	Not Submitted	03/22/2021	\$0.00	\$0.00
Total:				\$0.00

To view an expense report in Concur Expense, click the expense report name or ID in the **Report Name** column.

Clicking ✕ on the **REPORTS** page, returns the user to the **Expected Expenses** page.

Section 15: Confirmation Agreement

If confirmation agreements are configured for request policies, when a user clicks **Submit Request** the Submit Confirmation Agreement assigned to the selected request policy appears.

When the request approver clicks **Approve**, the Approval Confirmation Agreement assigned to the selected request policy appears.

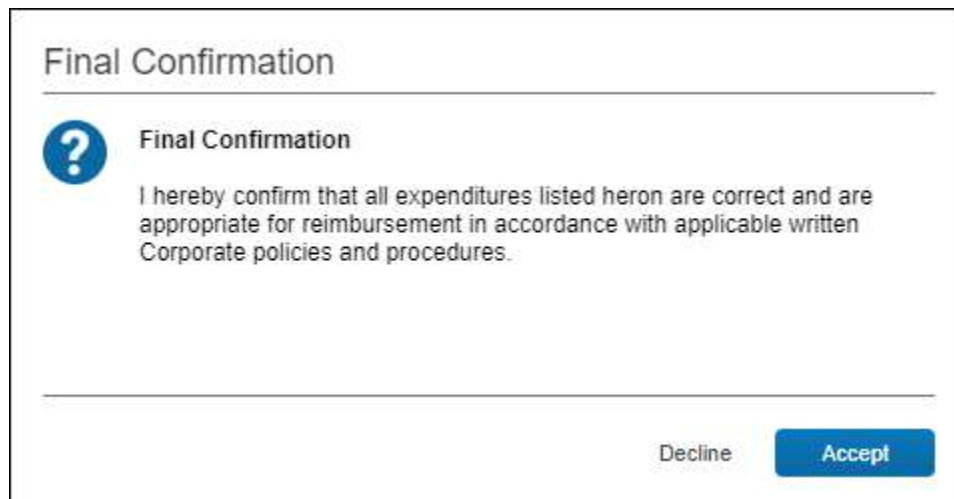
Existing UI

In the existing UI, clicking **Submit Request** opens the Submit Confirmation Agreement. The request creator clicks **Accept & Submit** to complete the request submission.



The screenshot shows a dialog box titled "Final Review" with a close button (X) in the top right corner. Below the title bar, the text "Request Submit Confirmation" is displayed. Underneath, there is a section titled "Acceptance of Liability" with the following text: "By submission of this request, I certify that: The expenses claimed as reimbursable on the form are a true and accurate accounting of the necessary business-related expenses to be incurred for this business trip." Below this, another line of text states: "I have not, and will not, be receiving reimbursement from any source for expenditures claimed as reimbursable nor have any expenditures claimed as reimbursable been paid by another entity." At the bottom right of the dialog, there are two buttons: "Accept & Submit" (in red) and "Cancel" (in blue).

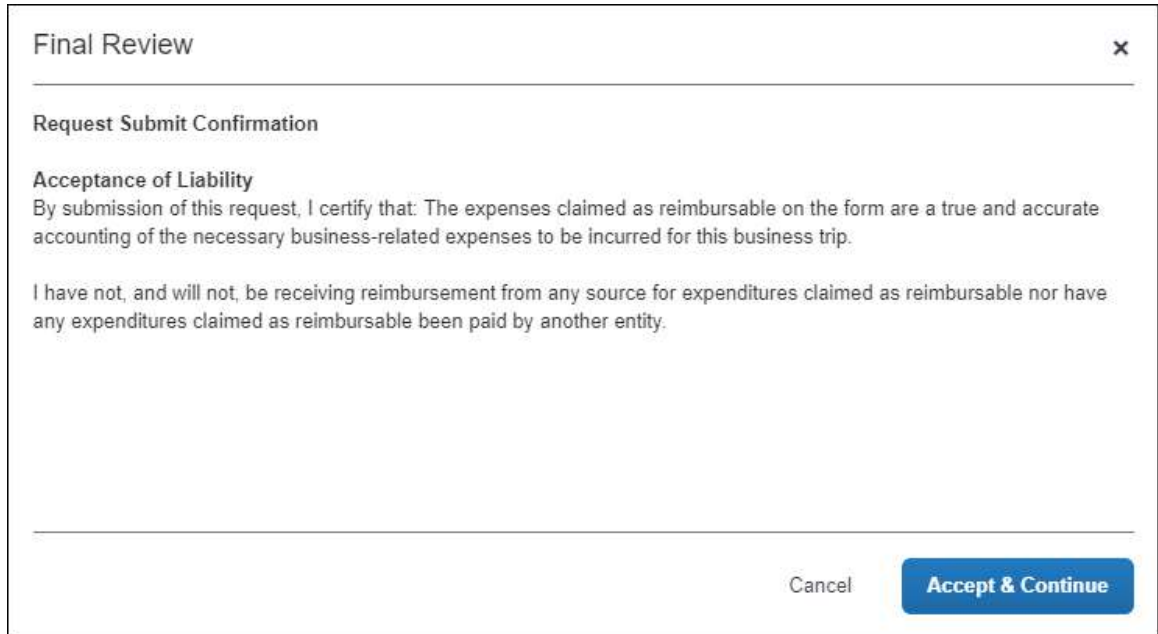
When the request approver clicks **Approve** to approve the request, the Approval Confirmation Agreement opens, and the approver clicks **Accept** to complete the approval.



The screenshot shows a dialog box titled "Final Confirmation" with a question mark icon in a blue circle on the left. Below the title bar, the text "Final Confirmation" is displayed. Underneath, there is a line of text: "I hereby confirm that all expenditures listed heron are correct and are appropriate for reimbursement in accordance with applicable written Corporate policies and procedures." At the bottom right of the dialog, there are two buttons: "Decline" and "Accept" (in blue).

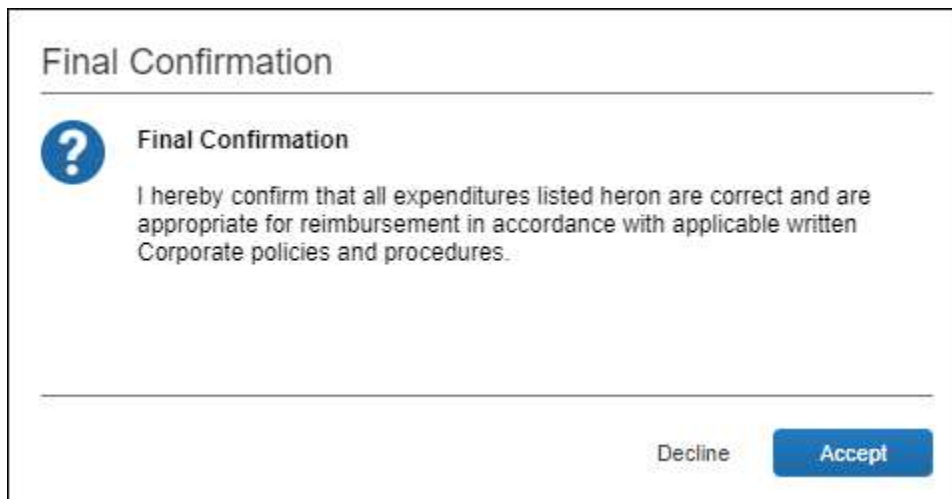
NextGen UI

In the NextGen UI for Concur Request, clicking **Submit Request** opens the Submit Confirmation Agreement. The request creator clicks **Accept & Continue** to complete the request submission.



The screenshot shows a dialog box titled "Final Review" with a close button (X) in the top right corner. Below the title bar, the text "Request Submit Confirmation" is displayed. Underneath, there is a section titled "Acceptance of Liability" with the following text: "By submission of this request, I certify that: The expenses claimed as reimbursable on the form are a true and accurate accounting of the necessary business-related expenses to be incurred for this business trip." Below this, there is another line of text: "I have not, and will not, be receiving reimbursement from any source for expenditures claimed as reimbursable nor have any expenditures claimed as reimbursable been paid by another entity." At the bottom right of the dialog, there are two buttons: "Cancel" and "Accept & Continue".

When the request approver clicks **Approve** to approve the request, the Approval Confirmation Agreement opens, and the approver clicks **Accept** to complete the approval.

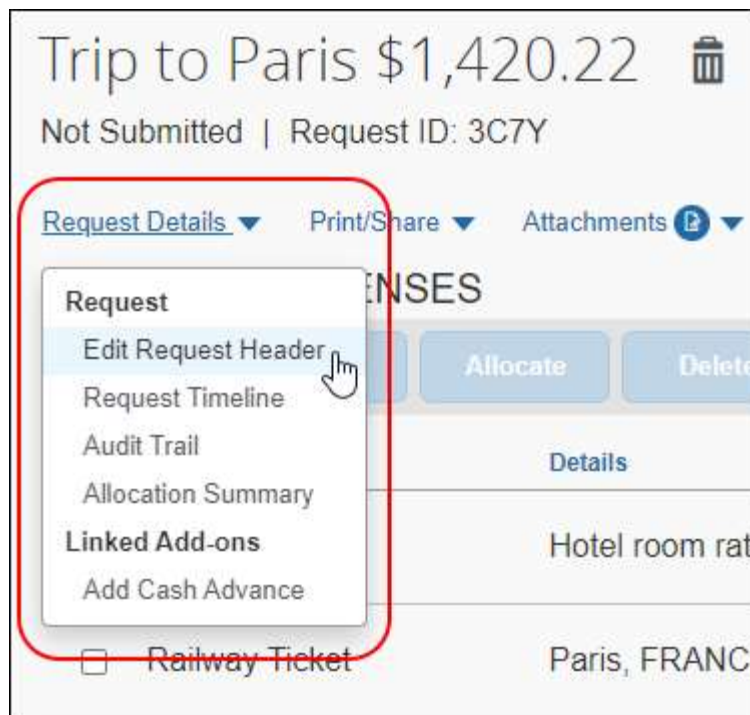


The screenshot shows a dialog box titled "Final Confirmation" with a question mark icon in a blue circle to the left of the title. Below the title, there is a line of text: "I hereby confirm that all expenditures listed heron are correct and are appropriate for reimbursement in accordance with applicable written Corporate policies and procedures." At the bottom right of the dialog, there are two buttons: "Decline" and "Accept".

Section 25: Edit Requests

Edit the Request Header

With the request open, on the **Request Details** menu, click *Edit Request Header*.



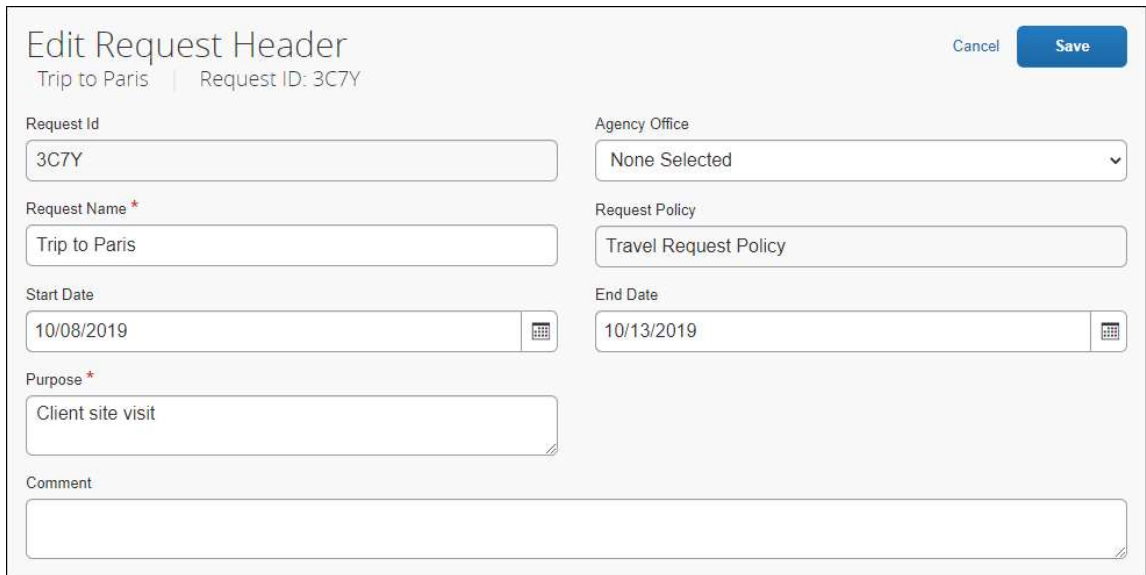
Clicking *Edit Request Header* opens the **Edit Request Header** page.

You can also click the request's name at the top of the **Expected Expenses** page to open the **Edit Request Header** page. Placing your pointer over the request name turns the name into a link.



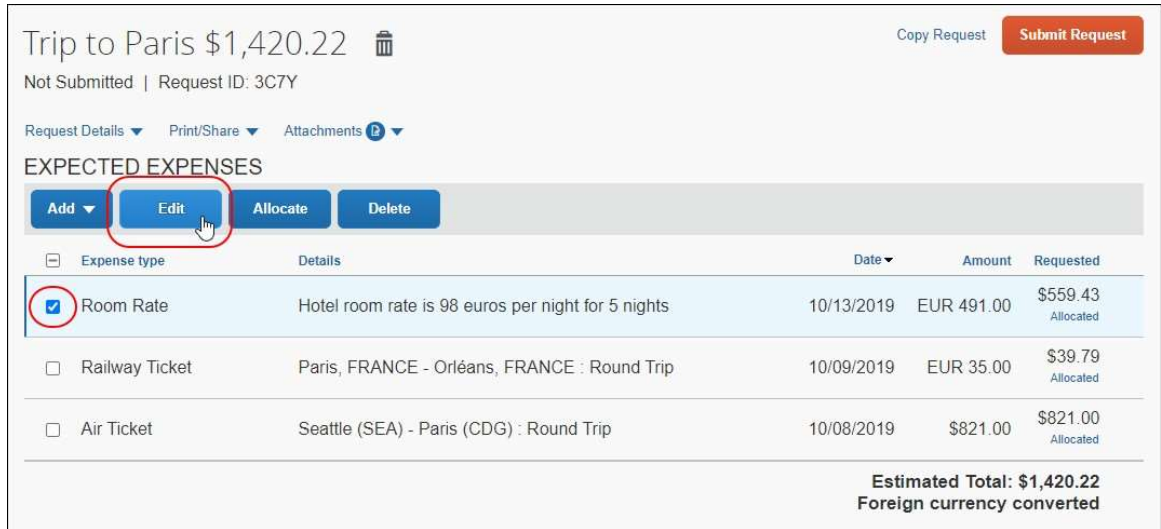
On the **Edit Request Header** page, make your changes and click **Save**.


NOTE: The request policy associated with a request cannot be edited after the request policy assigned to the request is saved during the initial request creation process.







Edit an Expected Expense

With the request open, select the expected expense you want to edit and then click **Edit**.




Trip to Paris \$1,420.22  Copy Request [Submit Request](#)

Not Submitted | Request ID: 3C7Y

Request Details  Print/Share  Attachments  

EXPECTED EXPENSES

[Add](#)  [Edit](#) [Allocate](#) [Delete](#)

<input type="checkbox"/>	Expense type	Details	Date	Amount	Requested
<input checked="" type="checkbox"/>	Room Rate	Hotel room rate is 98 euros per night for 5 nights	10/13/2019	EUR 491.00	\$559.43 Allocated
<input type="checkbox"/>	Railway Ticket	Paris, FRANCE - Orléans, FRANCE : Round Trip	10/09/2019	EUR 35.00	\$39.79 Allocated
<input type="checkbox"/>	Air Ticket	Seattle (SEA) - Paris (CDG) : Round Trip	10/08/2019	\$821.00	\$821.00 Allocated

Estimated Total: \$1,420.22
Foreign currency converted


Clicking **Edit** opens the expected expense details page. Make your edits and click **Save**.

Section 26: Copy Requests

Copy a Request


With the request open, click the **Copy Request** link or the **Copy Request** button, or click **More Actions**, and then click **Copy Request**.

NOTE: The request's current status and the other actions available to the request determine whether the **Copy Request** link, the **Copy Request** button, or the **More Actions** menu with the **Copy Request** selection is displayed for the request.

Trip to Paris \$1,420.22 

Not Submitted | Request ID: 3C7Y

[Copy Request](#) [Submit Request](#)

Request Details ▾ Print/Share ▾ Attachments  ▾

EXPECTED EXPENSES

[Add](#) ▾ [Edit](#) [Allocate](#) [Delete](#)

<input type="checkbox"/>	Expense type	Details	Date ▾	Amount	Requested
<input type="checkbox"/>	Room Rate	Hotel room rate is 98 euros per night for 5 nights	10/13/2019	EUR 491.00	\$559.43 <small>Allocated</small>
<input type="checkbox"/>	Railway Ticket	Paris, FRANCE - Orléans, FRANCE	10/09/2019	EUR 35.00	\$39.79 <small>Allocated</small>
<input type="checkbox"/>	Air Ticket	Seattle, Washington - Paris, FRANCE	10/08/2019	\$821.00	\$821.00 <small>Allocated</small>

Estimated Total: \$1,420.22
Foreign currency converted

Office Supplies \$0.00

Submitted & Pending Approval | Request ID: 3KMN

[Request Details](#) ▾ [Attachments](#) ▾

EXPECTED EXPENSES

No Expected Expenses
Add Expected Expenses to submit Request

[Copy Request](#)

Leadership Conference - Boulder \$444.62
 Approved - Pending Booking | Request ID: 3KMP

Request Details ▾ Print/Share ▾ Attachments ▾

EXPECTED EXPENSES

Expense type	Details	Date ▾	Amount	Requested
Car Rental	Jackson, Wyoming - Boulder, Colorado	10/13/2020	\$444.62	\$444.62

Estimated Total: \$444.62

More Actions ▾
 Recall
 Copy Request

Book Travel

The **Copy Request** dialog appears.

Copy Request ✕

New Request Name *

Starting Date For New Request (Previous Date 10/13/2019) *

Include:
 Expenses

Cancel

Complete the fields and then click **Create New Request**.

In the NextGen UI for Concur Request, the information that is copied, and the information that is not copied when copying a request, is the same as in the existing UI.

Information Copied

The following information is copied from the source request:

- Expected expenses (if the **Expenses** check box is selected (enabled) on the **Copy Request** page)
- Attendees
- Allocations

- Latest comment
- Other fields, like the **Purpose, Start Date** (based on the **Copy Request** page), custom fields, **Travel Agency** (the system first uses the agency from the source request; if not available, the system searches the Employee profile), etc.


Information NOT Copied

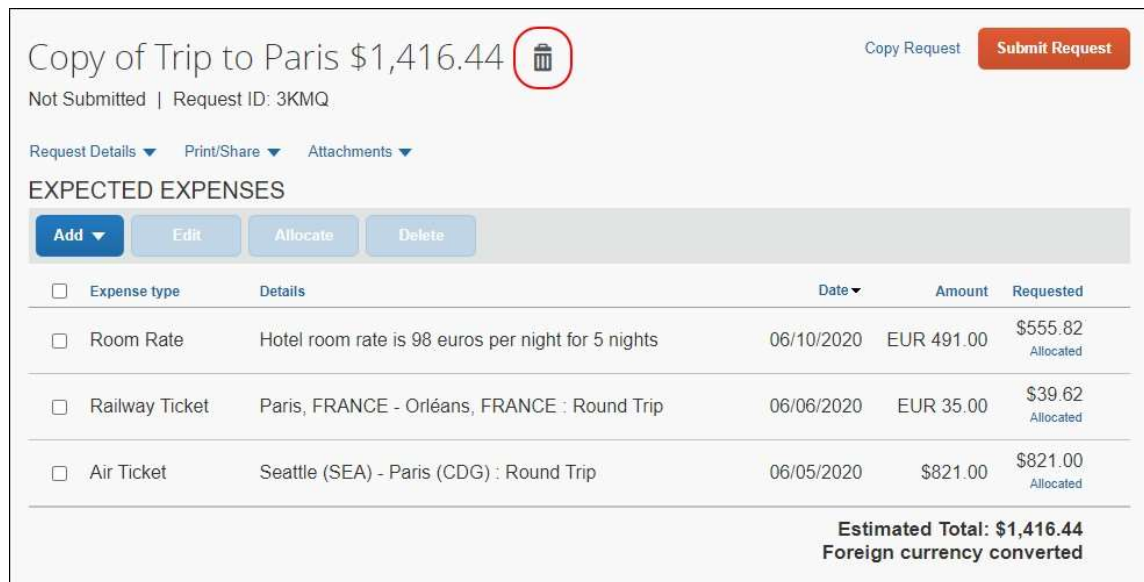
The following information is not copied from the source request:


- Attachments (images)
- Workflow
- Audit trail
- Any other information related to a policy that is no longer the user's current policy

Section 27: Delete Requests and Expected Expenses

Delete a Request

With the request open, click the delete icon, , located next to the request name and amount.



Copy of Trip to Paris \$1,416.44  Copy Request Submit Request

Not Submitted | Request ID: 3KMQ

Request Details ▾ Print/Share ▾ Attachments ▾

EXPECTED EXPENSES

Add ▾ Edit Allocate Delete

<input type="checkbox"/>	Expense type	Details	Date ▾	Amount	Requested
<input type="checkbox"/>	Room Rate	Hotel room rate is 98 euros per night for 5 nights	06/10/2020	EUR 491.00	\$555.82 <small>Allocated</small>
<input type="checkbox"/>	Railway Ticket	Paris, FRANCE - Orléans, FRANCE : Round Trip	06/06/2020	EUR 35.00	\$39.62 <small>Allocated</small>
<input type="checkbox"/>	Air Ticket	Seattle (SEA) - Paris (CDG) : Round Trip	06/05/2020	\$821.00	\$821.00 <small>Allocated</small>

Estimated Total: \$1,416.44
Foreign currency converted

This message appears.



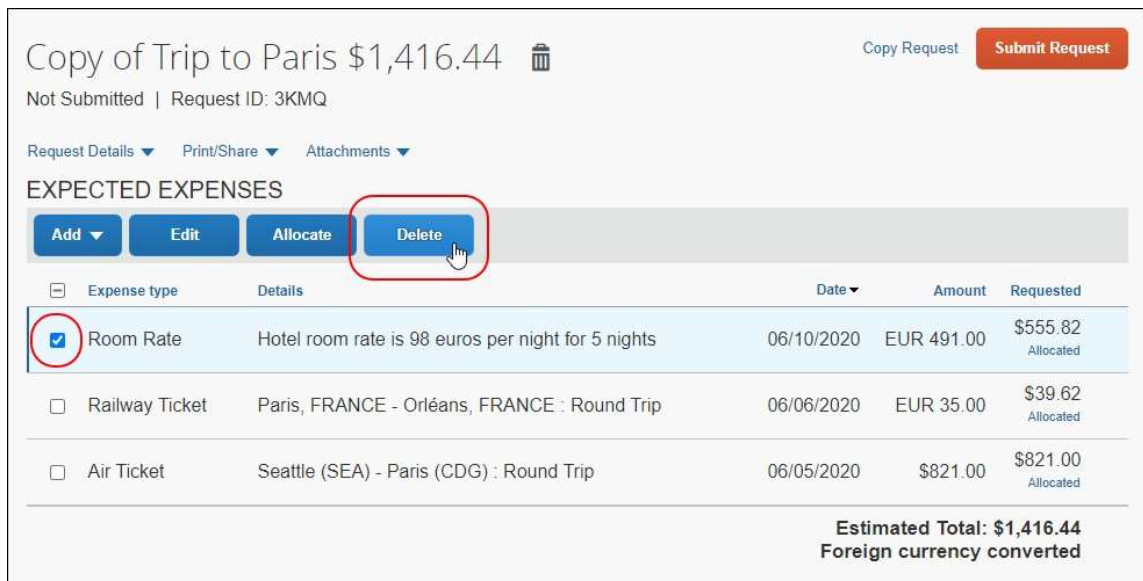
A confirmation dialog box titled "Confirm" with a close button (X) in the top right corner. The main text asks, "Are you sure you want to delete this request?". Below the text are two buttons: "No" and "Yes". The "Yes" button is highlighted in blue.

Click **Yes**. The request and its expected expenses are permanently deleted and cannot be recovered.

Delete an Expected Expense

Expected expenses can be deleted from either the **Expected Expenses** page or the expected expense details page.

On the **Expected Expenses** page, select the desired expected expense(s) and then click **Delete**.

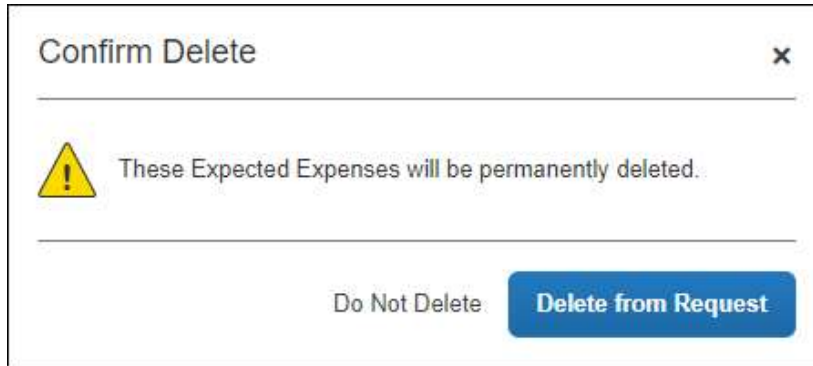


The screenshot shows the "Expected Expenses" page for a "Copy of Trip to Paris \$1,416.44". The page includes a "Copy Request" link and a "Submit Request" button. Below the header, there are navigation links for "Request Details", "Print/Share", and "Attachments". The main section is titled "EXPECTED EXPENSES" and contains a toolbar with "Add", "Edit", "Allocate", and "Delete" buttons. The "Delete" button is circled in red. Below the toolbar is a table of expenses with columns for "Expense type", "Details", "Date", "Amount", and "Requested". The "Room Rate" row is selected, indicated by a checked checkbox and a red circle around the checkbox. The "Estimated Total" is \$1,416.44, with a note that foreign currency is converted.

<input type="checkbox"/>	Expense type	Details	Date	Amount	Requested
<input checked="" type="checkbox"/>	Room Rate	Hotel room rate is 98 euros per night for 5 nights	06/10/2020	EUR 491.00	\$555.82 Allocated
<input type="checkbox"/>	Railway Ticket	Paris, FRANCE - Orléans, FRANCE : Round Trip	06/06/2020	EUR 35.00	\$39.62 Allocated
<input type="checkbox"/>	Air Ticket	Seattle (SEA) - Paris (CDG) : Round Trip	06/05/2020	\$821.00	\$821.00 Allocated


Estimated Total: \$1,416.44
Foreign currency converted

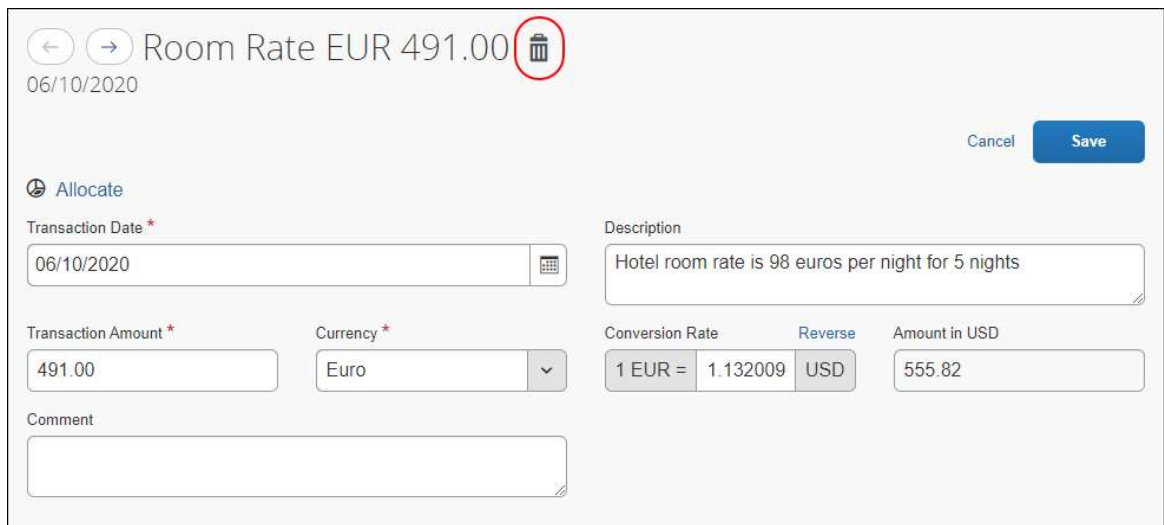
This message appears. Click **Delete from Request**.



A dialog box titled "Confirm Delete" with a close button (X) in the top right corner. Below the title bar is a horizontal line. On the left is a yellow warning triangle icon. To its right is the text "These Expected Expenses will be permanently deleted." Below this is another horizontal line. At the bottom are two buttons: "Do Not Delete" and "Delete from Request".

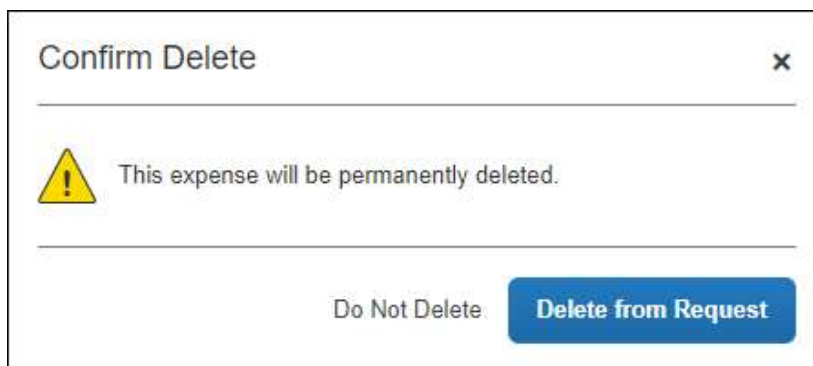
The selected expected expenses are permanently deleted and cannot be recovered.

On the expected expense details page, click the delete icon, , located next to the expected expense or segment name and amount.



A screenshot of a "Room Rate" details page. At the top, it shows "Room Rate EUR 491.00" with a trash icon circled in red. Below this is the date "06/10/2020" and "Allocate" with a lock icon. There are "Cancel" and "Save" buttons in the top right. The form contains several fields: "Transaction Date" (06/10/2020), "Description" (Hotel room rate is 98 euros per night for 5 nights), "Transaction Amount" (491.00), "Currency" (Euro), "Conversion Rate" (1 EUR = 1.132009), "Reverse" (USD), and "Amount in USD" (555.82). There is also a "Comment" field at the bottom.

This message appears. Click **Delete from Request**.



A dialog box titled "Confirm Delete" with a close button (X) in the top right corner. Below the title bar is a horizontal line. On the left is a yellow warning triangle icon. To its right is the text "This expense will be permanently deleted." Below this is another horizontal line. At the bottom are two buttons: "Do Not Delete" and "Delete from Request".

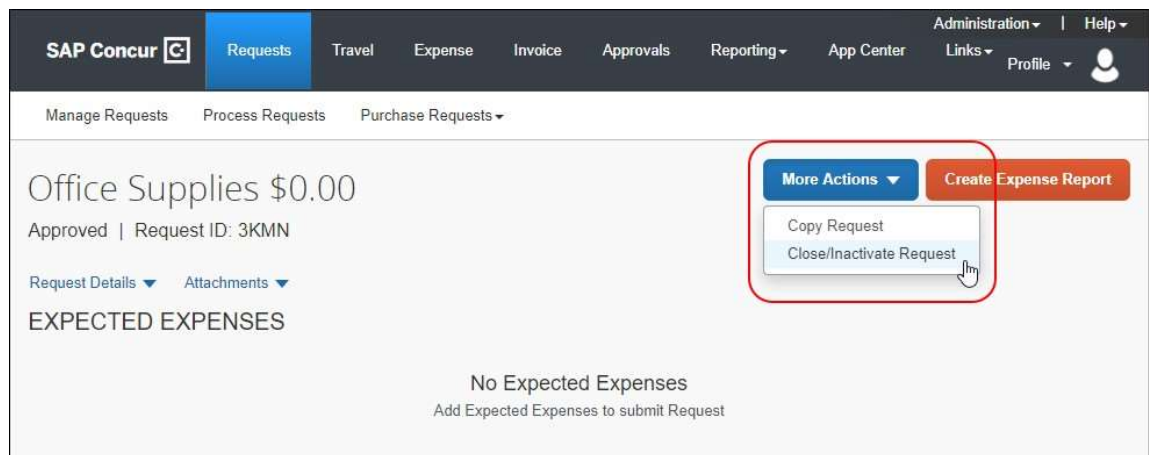
The expected expense is permanently deleted and cannot be recovered.

Section 28: Close/Inactivate Requests

If your organization allows requests to be closed or inactivated and a request is eligible to be closed or inactivated, the **Close/Inactivate Request** button is displayed on the **Expected Expenses** page.

This action removes the request from the user's list of requests. For example, a user may want to remove a cancelled or zero-balance request. The user can also close a request that still has a balance. For example, assume the request was approved for \$800 for airfare but the airfare expense was actually \$760. The user likely will not use the balance so the user can close the request.

With the request open, click **More Actions**, and then click **Close/Inactivate Request**.



This message appears.



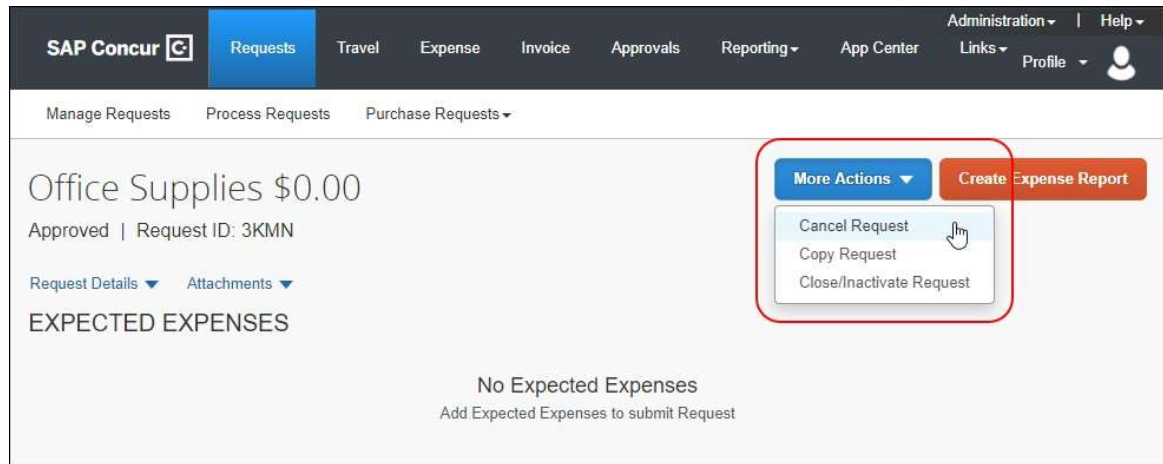
Click **OK**. Clicking **OK** reduces the balance to zero and removes the request from the list.

Section 29: Cancel Requests

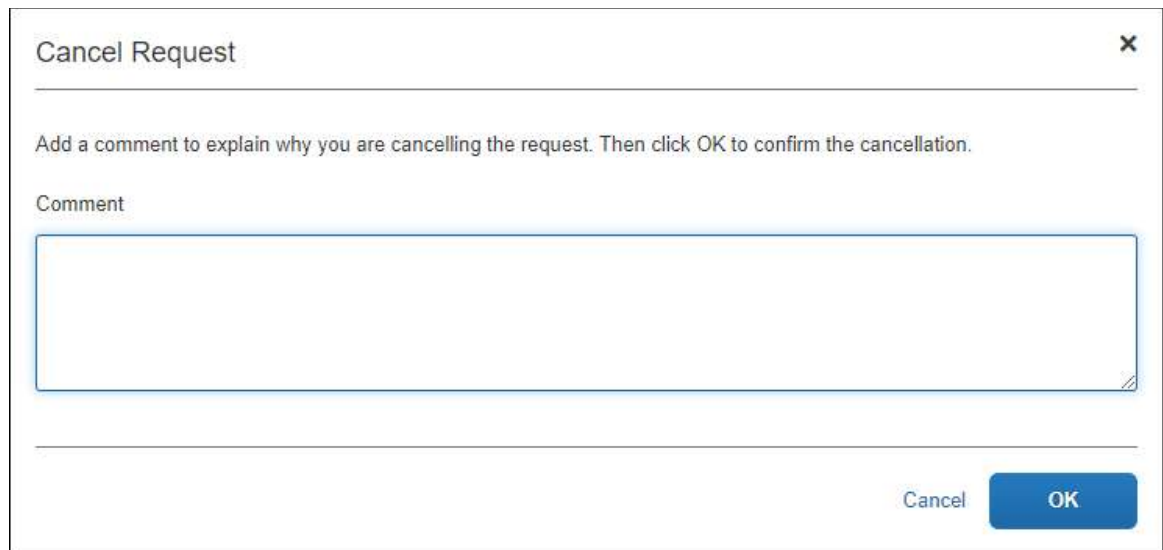
If your organization allows requests to be cancelled after submitting a request for approval, the **Cancel Request** button or the **Cancel Request** selection on the **More Actions** menu is available on the **Expected Expenses** page.

NOTE: The request's current status and the other actions available to the request determine whether the **Cancel Request** button, or the **More Actions** menu with the **Cancel Request** selection is displayed for the request.

With the request open, click the **Cancel Request** button, or click **More Actions**, and then click **Cancel Request**.



The **Cancel Request** dialog appears.



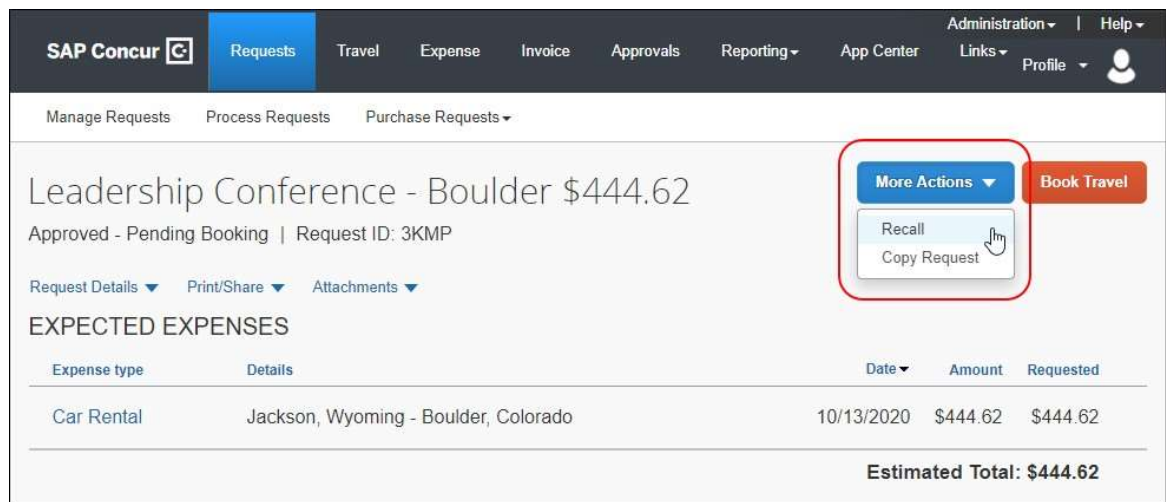
In the **Comment** field, enter the reason for cancelling the request and then click **OK**. Clicking **OK** changes the request status to Cancelled.

Section 30: Recall Requests

If your organization allows requests to be recalled after submitting a request for approval and/or after a request has been approved, and the request meets the criteria for being recalled, the **Recall** button or the **Recall** selection on the **More Actions** menu is available on the **Expected Expenses** page.

NOTE: The request's current status and the other actions available to the request determine whether the **Recall** button, or the **More Actions** menu with the **Recall Request** selection is displayed for the request.

With the request open, click the **Recall** button, or click **More Actions**, and then click **Recall**.



The screenshot shows the SAP Concur interface for a request titled "Leadership Conference - Boulder \$444.62". The request is in "Approved - Pending Booking" status with Request ID: 3KMP. A "More Actions" dropdown menu is open, showing "Recall" and "Copy Request" options. A red box highlights the "Recall" option. Below the menu is a "Book Travel" button. The "EXPECTED EXPENSES" table is visible, showing a "Car Rental" expense for "Jackson, Wyoming - Boulder, Colorado" on "10/13/2020" for an amount of "\$444.62". The "Estimated Total" is "\$444.62".

Expense type	Details	Date	Amount	Requested
Car Rental	Jackson, Wyoming - Boulder, Colorado	10/13/2020	\$444.62	\$444.62

Estimated Total: \$444.62

This message appears.



The screenshot shows a "Confirm" dialog box with a close button (X) in the top right corner. The main text asks, "Are you sure you want to recall this request?". At the bottom, there are two buttons: "No" and "Yes".

Click **Yes**. Clicking **Yes** changes the request status to Returned.

A user can recall a request after it is submitted but before it is approved. If the workflow allows or requires more than one approver, then the user can recall the request until it is *final* approved.